

Mass Assign Example - Outline of Steps

Overview of the steps for reading the data source and running the processes for Service Indicator Mass Assign Using PS Query and External File Load

1. **EXAMPLE 1 – MASS ASSIGN USING PS QUERY**

This is an example of using Pop Select with the **Mass Assign Process** to add a Service Indicator to a limited group of students with the **Selection Tool PS Query**.

- *This example assumes the following:*
 - *The Selection Tool page has been completed for PS Query.*
 - *The Pop Select function called Context Definition has been set up for this process to be utilized with the Selection Tool of PS Query.*
 - *The Service Indicator already exists.*
 - *The user has the required security to perform these activities, including the right to place and/or release the Service Indicator.*
 - *The user is familiar with working with PeopleSoft Query.*

A. **PS Query –**

1. **Creating and Reading the Data Source** - Navigation: *Main Menu > Reporting Tools > Query > Query Manager*
 - a. Create a **Query** to select the group of students
 - b. Find the base query that contains the Bind Record in Query Manager
 - c. IMMEDIATELY SAVE THE QUERY UNDER A NEW NAME. Do not use the delivered name for a query you will be working with.
 - d. Add the record, or records, to the top level of the query that will identify the desired population.
 - e. Define the group, setting the appropriate criteria.
 - f. Open the **Mass Assign** page
2. *Mass Assign setup for PS Query* - Navigation: *Main Menu > Campus Community > Service Indicators (Student) > Mass Assign*
 - a. **Mass Assign** page using a sample Run Control ID of “testquery1”
 - i. Selection Tool: PS Query
 - ii. Query Name: select
 - iii. Launch Query Manger if needed
 - iv. Always click on Preview Selection Results
 - v. Institution: Wesleyan University
 - vi. Service Indicator Code: select
 - vii. Reason: select
 - viii. Check System Date unless another date is appropriate
 - ix. Fill in desired fields under Effective Period
 - x. Effective Period, Assignment Details, and Contact Information
 - i. **Start Date value is required**
 - ii. Otherwise, some fields are pre-populated. You may edit, add or ignore.

Mass Assign

Run Control ID: testquery1 Report Manager Process Monitor **Run**

Population Selection

Selection Tool: PS Query
Query Name: WES_TEST_CC_SVCIND_SMPL_S/ Launch Query Manager **Preview Selection Results**

Service Indicator Data

*Institution: Wesleyan University
*Service Indicator Code: SA Student Accounts Office
*Reason: SABAL Student Account Balance Use System Date

Effective Period

Start Term: 0000 Begin Term - Svc Indicatr Use End Term:
Start Date: 08/06/2018 End Date:

Assignment Details

*Department: 1023 Student Accounts Office
Reference:
Amount: 0.000 Currency Code: USD Dollar

Contact Information

Contact ID: Contact Person:
Placed Person ID: Placed By:

Comments

Save **Notify** **Add** **Update/Display**

*b. Always select the **Preview Selection Results** link to see the output.*

Preview Selection Results

Return

	ID
1	
2	

Return

- c. If there are Prompts in the Query, the **Edit Prompts** link will appear (there are none in this example)
- d. Click Run to run the process or Save to run and Save it.

Process Scheduler Request

User ID [REDACTED] Run Control ID testquery1

Server Name [Dropdown] Run Date 08/06/2018 [Calendar]

Recurrence [Dropdown] Run Time 11:37:43AM [Reset to Current Date/Time]

Time Zone [Dropdown]

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Publish Assign Service Ind	EIPSIASG	PSJob	(None)	(None)	Distribution
<input type="checkbox"/>	SCC_SI_ASSN	SCC_SI_ASSN	Application Engine	Web	TXT	Distribution

OK Cancel

- e. Under Process List > Select, only check the box next to SCC_SI_ASSN.
- f. Make any changes needed for Type and Format.
- g. Run and Refresh as with any process until Run Status is Success and Distribution Status is Posted.
- h. To confirm the change to an individual student’s Service Indicator page, navigate to *Main Menu > Campus Community > Service Indicators (Student) > Manage Service Indicators*.
- i. To see all results of this **Mass Assign**, you can run a query that will display the students who have the Service Indicator and Reason associated with their EmplID. This query prompts for the Service Indicator Reason and for a Greater Than Date: **WSI_STU_HOLD_RSN_DATE_PROMPTED**

Manage Service Indicators

[REDACTED] Class 201 [REDACTED]

Display Effect [All] Institution Wesleyan University Refresh

+ Add Service Indicator

Code	Code Description	Reason Description	Institution	Start Term	End Term	End Term Description	Start Date	End Date
SA	Student Accounts Office	Student Account Balance	WSLYN	0000	Begin Term		08/06/2018	
SA	Student Accounts Office	No Store Charging Privileges	WSLYN	1160	Fall 16		10/05/2016	
TRN	Transcript Hold	Student Account Balance	WSLYN	0000	Begin Term		11/15/2016	

+ Add Service Indicator

Return to Search Notify

B. EXAMPLE 2 – USING EXTERNAL FILE LOAD

This is an example of using Pop Select with the **Mass Assign Process** to add a Service Indicator to a select group of students with the **Selection Tool External File**.

- *This example assumes the following:*
 - *The Population Selection File Map has been set up defining the required fields, file type, etc.*
 - *The Selection Tool page has been completed for External File.*
 - *The Pop Select function called Context Definition has been set up for this process to be utilized with the Selection Tool of External File.*
 - *The Service Indicator already exists.*
 - *The user has the required security to perform these activities, including the right to place and/or release the Service Indicator.*
 - *The user is familiar with working with Microsoft Office Excel.*

A. External file

1. Mass Assign setup for External Load - Navigation: Main Menu > Campus Community > Service Indicators (Student) > Mass Assign

- a. If there is an existing Run Control, Select it; otherwise, create and add a new Run Control.
- b. **Mass Assign** page using a sample Run Control ID of "test3."
 - i. Selection Tool: PS External File
 - ii. Attached File:
 - i. Upload File: browse and select; file name appears next to label Attached File
 - ii. Delete File: if needed
 - iii. View File: always view file
 - iii. File Mapping: select to see any existing File Mapping Names in the Look Up File Mapping page.
 - i. Note that Create File Mapping changes to Edit File Mapping enabling changes to the mapping
 - ii. Always click on link that now appears - Preview Selection Results
 - iv. Institution: Wesleyan University
 - v. Service Indicator Code: select
 - vi. Reason: select
 - vii. Check System Date unless another date is appropriate
 - viii. Fill in desired fields under Effective Period
 - ix. Effective Period, Assignment Details, and Contact Information
 - i. **Start Date value is REQUIRED**
 - ii. Otherwise, some fields are pre-populated. You may edit, add or ignore.

Mass Assign

Run Control ID: test3 Report Manager Process Monitor [Run](#)

Population Selection

Selection Tool: External File

Attached File: sabal_test_250957_08032018.csv [Upload File](#) [Delete File](#) [View File](#)

File Mapping: WES_TEST_SRV_IND [Edit File Mapping](#) [Preview Selection Results](#)

Service Indicator Data

*Institution: Wesleyan University

*Service Indicator Code: SA Student Accounts Office

*Reason: SABAL Student Account Balance Use System Date

Effective Period

Start Term: 1189 Fall 2018 End Term:

Start Date: 08/03/2018 End Date:

Assignment Details

*Department: 1023 Student Accounts Office

Reference:

Amount: Currency Code: USD Dollar

Contact Information

Contact ID: Contact Person:

Placed Person ID: Placed By:

Comments

test3

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#)

c. Always select the **Preview Selection Results** link to see the output.

Preview Selection Results

[Return](#)

	EMPLID
1	<input type="text"/>

[Return](#)

d. Click Run to run the process or Save to run and Save it.

Process Scheduler Request

User ID: CPIKE01 Run Control ID: test3

Server Name: Run Date: 08/06/2018

Recurrence: Run Time: 3:15:56PM

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Publish Assign Service Ind	EIPSIASG	PSJob	(None) <input type="button" value="v"/>	(None) <input type="button" value="v"/>	Distribution
<input type="checkbox"/>	SCC_SI_ASSN	SCC_SI_ASSN	Application Engine	Web <input type="button" value="v"/>	TXT <input type="button" value="v"/>	Distribution

- e. Under Process List > Select, only check the box next to SCC_SI_ASSN.
- f. Make any changes needed for Type and Format.
- g. Run and Refresh as with any process until Run Status is Success and Distribution Status is Posted.
- h. To confirm the change to an individual student’s Service Indicator page, navigate to *Main Menu > Campus Community > Service Indicators (Student) > Manage Service Indicators*.

Manage Service Indicators

Class: None

Display: Effect: All Institution: Wesleyan University

Add Service Indicator

Service Indicator Summary									
Code	Code Description	Reason Description	Institution	Start Term	End Term	End Term Description	Start Date	End Date	
SA	Student Accounts Office	Student Account Balance	WSLYN	1189	Fall 18		08/03/2018		

Add Service Indicator

- i. To see all results of this **Mass Assign**, you can run a query that will display the students who have the Service Indicator and Reason associated with their EmplID. This query prompts for the Service Indicator Reason and for a Greater Than Date:
WSI_STU_HOLD_RSN_DATE_PROMPTED