Introduction to Population Selection (Pop Select) and Mass Assign

The following is an introduction to the Pop Select and Mass Assign features of PS Versions 9.2. There are other processes that may be applied once the population is identified; however, this document only looks at the Pop Select/Mass Assign example. The text is adapted from a number of sources. *As with any batch process, you are directing the system to perform an action on the specified IDs that is based on your run control parameters.*

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> *It is important to realize that once you select the IDs and run the process (for instance, Mass Assign), it may be very difficult to undo the process.*
>
> *For example, if you place a Service Indicator and then release it, that Service Indicator is not deleted from the record. It is a part of the record's history. Therefore, you should apply the same care in selecting and updating records as you would with one individual ID or with any other batch process.*

Contents:

<div style="background:#c00;color:#fff;text-align:center;font-weight:bold">Pop Select and Mass Assign</div>

1. **What is Population Selection (Pop Select)?** Some definitions of Pop Select:
   a. A delivered tool that allows an institution to customize selection of students for processing.
   b. A utility that allows users to define custom criteria to drive batch processing.
   c. A framework that feeds populations to a client process, such as EmplIds, Orgs, or any other fields. It is engineered for easy integration into existing processes.
   d. A feature introduced in Campus Solutions 9.0 that allows users to fine tune the selection of person and/or organization IDs in several batch processes. (Previously there were no delivered capabilities to select groups or subsets of person or org IDs.)
   e. *The essential thing to remember is that Pop Select is just a tool to gather the IDs. The delivered process* **using** *the Pop Select- such as Mass Assign - determines what occurs with those IDs.*

2. **Why use Pop Select?**
   a. Pop Select allows you to select exactly the IDs you need.

      b.   It can replace customizations built to tailor selection criteria.

      c.   With (significant) programming effort, you can add Pop Select to other processes.

3. **Where is Pop Select used?**
   a. Pop Select is delivered integrated into 20 application processes (See [Appendix A](#)). Among the processes are:
      i. Service Indicators – Mass Assign (Persons and Organizations)
      ii. Service Indicators – Mass Release (Persons and Organizations)
      iii. 3C Engine (Communications, Comments and Checklists)
      iv. Process Student Groups
      v. Population Update of miscellaneous tables

4. **Who uses Pop Select?**
   a. Once set up, Pop Select is used by functional end users.

5. **How are the selections made?**
   a. The selections are made with a **Population Selection** tool.
   b. The three **Selection Tools** (methods) for defining a population are:
      i. **PS Query** - required data are in PS. Logic is a single step.
      ii. **External File** – required data are outside of PS. No logic is needed.
      iii. *Equation Engine – Required data are in PS. Complex logic is needed. (Note that an example using Equation Engine is <u>not</u> covered in this document.)*
   c. The end user is still responsible for verifying that the tool selects the appropriate group of IDs.
   d. **Important: The process will affect each ID in the population.**
   e. *NOTE: Other selection tools can be created; however, they would require considerable programming effort.*

6. **What are the attributes of each of the Selection Tools?**
   a. **PS Query** is the most commonly used Population Selection tool
      i. SQL may be written in Query Manager to select a population based on available records
      ii. Requires the use of Bind Records
      iii. Results may be previewed prior to running the process

   b. **External File Load** requires File Mapping to be set up prior to uploading a file
      i. It is useful for loading files from other departments
      ii. Results may be previewed prior to running the process

   c. **Equation Engine** is used in more complex circumstances such as calculations or conditional statements. It is commonly used in Student Financials and Financial Aid.
      i. Requires the use of Bind Records
      ii. Results may be previewed prior to running the process.

7. **What are the basic steps in using the Selection Tools?**
   a. Identify the selection criteria
   b. Determine the Selection Tool
   c. Using the Selection Tool:

       i.   Write a Query including the Bind record *OR*

      ii.   Write an Equation including the Bind Record *OR*

     iii.   Map an External File and upload

   d.   Update through a Process or update a record.

   e.   Important: Pop Select will not change the delivered process.

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

   a.   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**.

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

   c.   The main steps are as follows:

   <mark>Create a query to select the group of students</mark>

   Navigation: Main Menu > Reporting Tools > Query > Query Manager

      1.   Find the base query that contains the Bind Record in Query Manager

          *a.   Bind Records **must be included** in all Queries and Equations used for Population Selection.*

          b.   The Bind Record must be used because Population Selection needs to know which fields are required to run a particular process. The Bind Record contains those required fields.

          c.   Bind records are predefined.

              i.   If the name of the desired Bind Record is unknown, all can be looked up using the record name %BND or %BIND.

             ii.   In this example, the Bind Record for **Mass Assign of individuals** is **SCC_BND_SRCIND**.

          d.   Each bind record is linked to a delivered process which contains the option for Population Selection.

          e.   Delivered Queries and Equations provide examples of how to write Bind Records for your process.

          f.   The Bind Record can be placed anywhere in the Query or Equation; the key is that it is present.

      2.   On the Query Manager page, perform a search for the following query:

          QA_CS_CC_PS_SRVCIND_PERS

      3.   Click on **Edit**.

4. IMMEDIATELY SAVE THE QUERY UNDER A NEW NAME. Do not use the delivered name for a query you will be working with.

5. The newly named query (in this example, WES_TEST_CC_SRVCIND_SAMPLE) now looks like this:


6. Note that there is a subquery associated with this query.
   a. A subquery is a query whose results are used by another query. The main query uses the subquery's result set as a comparison value for a selection criterion.
   b. Take a look at the **Subquery**, but do not make any changes to it:
      i. Navigate to the **Subquery**, by clicking on the **Subquery/Union Navigation** link as shown above. You will be taken to this page.
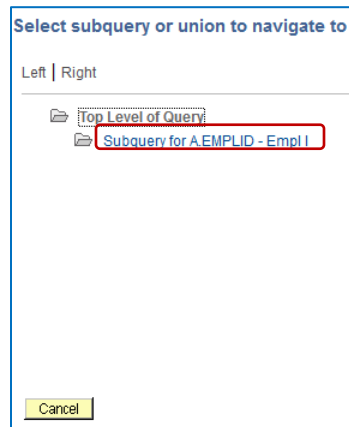
c. Then click the link reading **Subquery for A.EmpLID – Empl I**.
d. The subquery opens as seen below. The one record in the subquery is SRVC_IND_DATA (Service Indicator Data). It has the Alias of "B."
e. If you click on the **Fields** tab, the one field that results is EMPLID. EMPLID will in turn be used by the top level of the query.
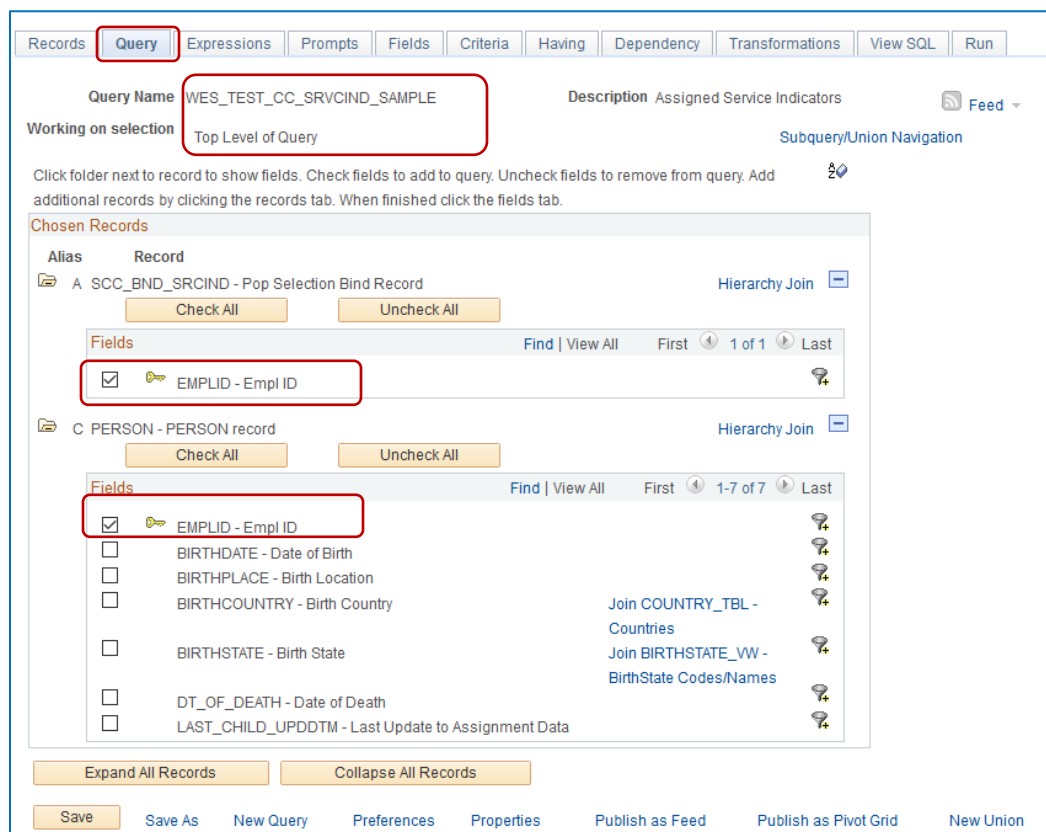f. Below are views of the Query and Fields pages (tabs) in the subquery.
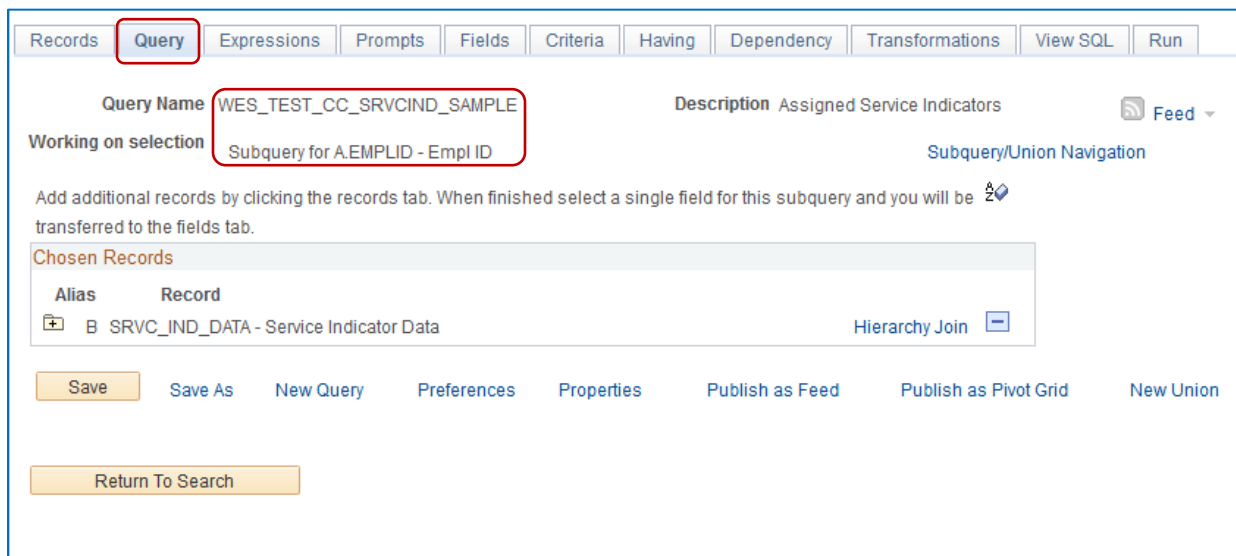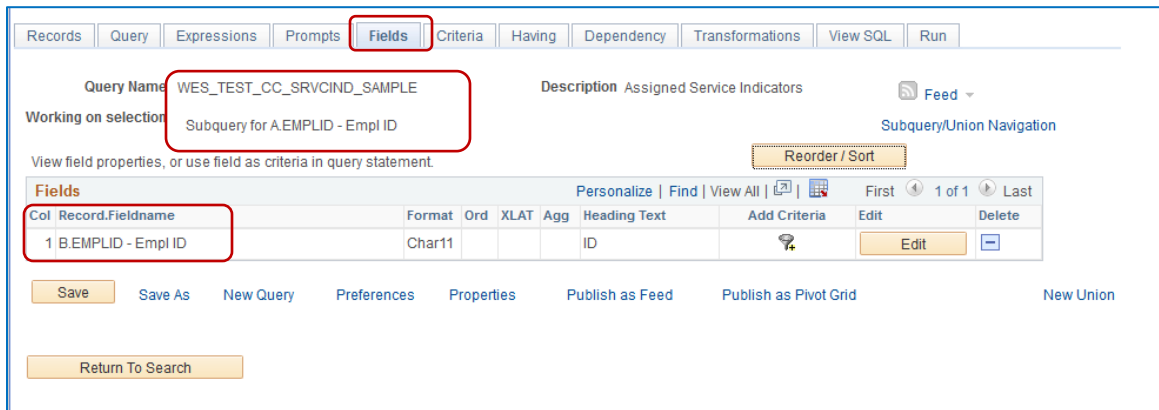
7. **IMPORTANT: DO NOT ALTER THE SUBQUERY.** You only need to work with the **Top Level of Query.**
8. Navigate back to the **Top Level of Query** by clicking the **Subquery/Union Navigation** link.
9. Add the record - or records - to the Top Level of Query that will identify the desired population. In this example, the PERSON record is added, joined on the EMPLID field.
10. Check EMPLID on the Query page for the PERSON record, which has the "C" alias. It is already checked on the A.SCC_BND_SRCIND record.

11. On the Fields page, click the Add Criteria icon (funnel) for C.EMPLID.

12. Add the criteria. In this example, it is just one EMPLID. Note that it is the EMPLID of a Test Student who has Service Indicators applied.

13. After adding the criteria, open the Criteria page which should now look like this:
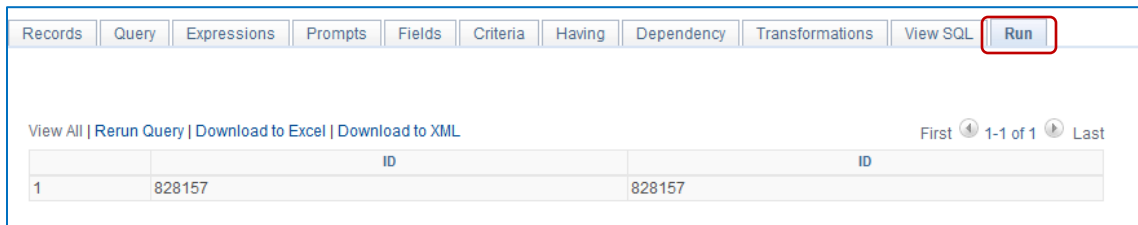

14. Run the query to observe that it returns the expected rows; in this example it is just the one row for EMPLID 828157.

	Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View SQL	Run

View All | Rerun Query | Download to Excel | Download to XML   First ◀ 1-1 of 1 ▶ Last
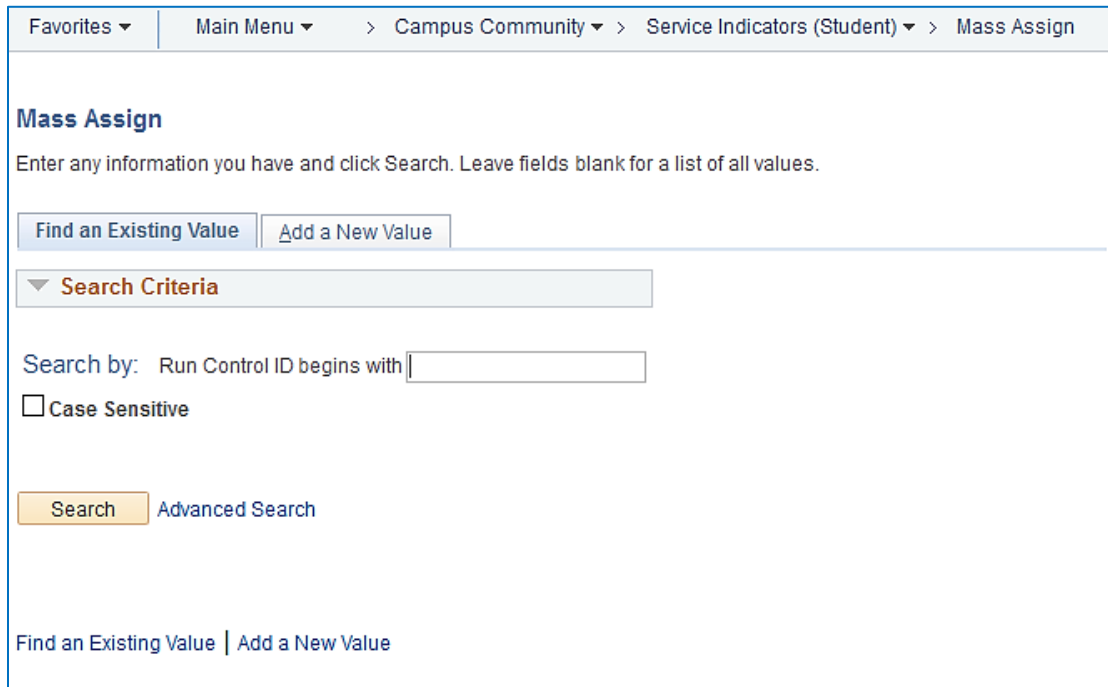
	ID	ID
1	828157	828157

15. **Save the query.** Note that you may use prompts with the query to make it more flexible.

Open the Mass Assign page in PeopleSoft to Mass Assign Service Indicators
Navigation: Main Menu > Campus Community > Service Indicators (Student) > Mass Assign

16. If there is an existing Run Control, you can click Search and select it
17. For this example, a new Run Control is created (*TEST_MASS_ASSIGN_QUERY*).

Favorites ▼   Main Menu ▼   >   Campus Community ▼ >   Service Indicators (Student) ▼ >   Mass Assign

Mass Assign

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ **Search Criteria**

Search by: Run Control ID begins with [   ]
☐ Case Sensitive

[Search]   Advanced Search

Find an Existing Value | Add a New Value

18. Below is a view of the entire blank page which has these main sections:
   a. **Population Selection**
   b. **Service Indicator Data**
   c. **Effective Period**
   d. **Assignment Details**
   e. **Contact Information**
   f. **Comments**

19. **Population Selection**
    a. Once you choose PS Query as the **Selection Tool**, you have the option of clicking a link named **Launch Query Manager**, which will open the **Query Manager** page.
    b. Otherwise, you can simply select the **Query Name** from a list (Look Up Query Name) that includes all existing queries that contain the Bind Record.
    c. Or, as with **PS Query**, you can type the first few letters of the Query Name and see a listing.

d. Select the newly created query.
e. You are given the option to click a link named **Preview Selection Results**. *You should always select this link in order to verify the outcome of the process.*

Population Selection			
Selection Tool:	PS Query		
Query Name:	WES_TEST_CC_SRVCIND_SAMPLE 🔍	Launch Query Manager	Preview Selection Results

f. Once you click on the link, a page headed Preview Selection Results will display exhibiting all of the student records that will be assigned the Service Indicator.
g. *Verify that the results are what you expect to see*. If not, double-check that the query returns the correct results and that you have saved the query.
h. Once you have viewed the page and verified the information, click on the yellow Return button and you will be returned to the **Mass Assign** page.

Preview Selection Results

Return

	ID	ID
1	828157	828157

Return

20. Service Indicator Data
   a. **Institution** – the default is Wesleyan University
   b. **Service Indicator Code** – click on the magnifying glass to select the desired Code from a listing entitled **Look Up Service Indicator Code** or you can type the Code if known.
   c. **Reason** – similarly, a listing entitled **Look Up Reason** opens displaying only those Reasons associated with that Service Indicator Code.
   d. **System Date** – may be checked

Service Indicator Data		
*Institution	Wesleyan University	
*Service Indicator Code	HC2 🔍 Health Center Info Only	
*Reason	INS 🔍 Health Insurance	☑ Use System Date

21. Effective Period
   a. Depending upon how the query is structured, you *may* be required to enter any or all of these fields
      i. **Start Term (required)**
      ii. **End Term**
      iii. **Start Date** (defaults to today's date)
      iv. **End Date**

Effective Period

Start Term 0000 🔍 Begin Term - Srvc Indicatr Use   End Term ___ 🔍
Start Date 07/09/2018 📅   End Date ___ 📅

NOTE: The page now appears similar to the following. You may Save the page at this time before running the process or wait until it has completed running.

Mass Assign

Run Control ID: TEST_MASS_ASSIGN_QUERY   Report Manager   Process Monitor   [Run]

Population Selection

Selection Tool PS Query ▾
Query Name WES_TEST_CC_SRVCIND_SAMPLE 🔍   Launch Query Manager   Preview Selection Results

Service Indicator Data

*Institution Wesleyan University ▾
*Service Indicator Code HC2 🔍   Health Center Info Only
*Reason INS 🔍 Health Insurance   ☑ Use System Date

Effective Period

Start Term 0000 🔍 Begin Term - Srvc Indicatr Use   End Term ___ 🔍
Start Date 07/09/2018 📅   End Date ___ 📅

Assignment Details

*Department 1012 🔍 Health Services Department
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]

---

22. Assignment Details
   a. **Department** (defaults to the Department that owns the Service Indicator Code)
   b. **Reference**
   c. **Amount**
   d. **Currency**
23. Contact Information

a. **Contact ID** (enter an EMPLID)
b. **Contact Person** (automatically adds Name of Contact Person)
c. **Placed Person ID** (defaults to user)
d. **Placed By** (automatically displays name of **Placed Person ID**)

24. Comments

25. Running the Process

    a. This is similar to other processes you may have run. Click the yellow Run button at the top.

    b. When the Process Scheduler Request page opens, only check the **Select** box next to **SCC_SI_ASSN**, and click **OK**. If you select the other box, it may cause unexpected results**.**

    c. You will be returned to the **Mass Assign** page. The top of the page now resembles this:

    d. Click on the Process Monitor link, and when the Process page opens, click Refresh until the Run Status = Success and the Distribution Status = Posted.

e.   Save the **Run Control -** If you haven't already, click Save in order to save the Run Control for later use.

26. To see the 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

27. To see the results for one individual, open the Manage Service Indicators page for one student who appears on the original query. You can see the results of this process below.   *Navigation: Main Menu > Campus Community > Service Indicators (Student) >Manage Service Indicators*

Manage Service Indicators

TESTNAME,Original   Class None   828157

Display   Effect All ⌄   Institution Wesleyan University ⌄   Refresh ↻

⊞ Add Service Indicator

Service Indicator Summary

Personalize | Find | View All | ⬚ | ⬚   First ◁ 1-4 of 4 ▷ Last

Code	Code Description	Reason Description	Institution	Start Term		End Term	End Term Description	Start Date	End Date
DN	Dean's Office	Community Standards Board	WSLYN	1101	Spring 10			01/14/2010	
DN	Dean's Office	No Senior Concentration Form	WSLYN	1091	Spring 09			01/20/2009	
HC1	Health Center Info	Meningitis	WSLYN	0000	Begin Term			08/01/2012	
HC2	Health Center Info Only	Health Insurance	WSLYN	0000	Begin Term			07/09/2018	

⊞ Add Service Indicator

[Return to Search] [Notify]

28. **A note regarding Prompts:** If there are one or more prompts in the Query, a new link (**Edit Prompts**) will appear on the Selection Tool line once you select the Query name. (Note: there are no prompts in the example shown above.) If there is a prompt in the query, the link will appear as follows:

Population Selection

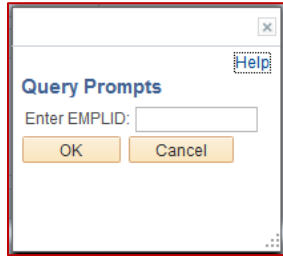Selection Tool: PS Query ⌄   **Edit Prompts**
Query Name: WES_TEST_CC_SRVCIND_SMPL_PRMI 🔍   Launch Query Manager   Preview Selection Results

a.   Click on the Edit Prompts link, and a small box will pop up containing the prompt(s) associated with the Query.
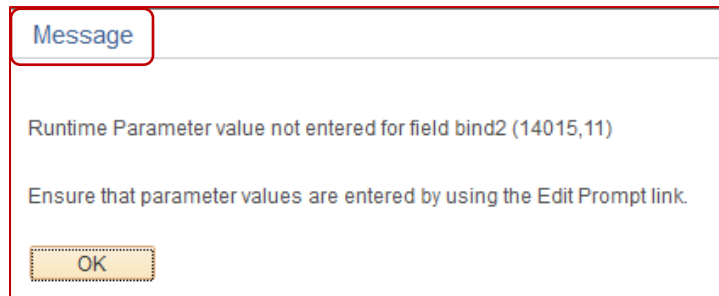
b. Enter the desired information, and click **OK**.

c. Note that if you try to run the process without filling the Prompt, you will receive an error message:

d. In that case, click on OK, and then click on the **Edit Prompts** link as described above.

9. **EXAMPLE 2 – USING EXTERNAL FILE LOAD**

    a. 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**.

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

    c. The main steps for working with an **External File** are as follows:
        i. Prepare the external document to be downloaded
            1. For this example, it is a CSV file that was created from an Excel file
            2. It contains one row, i.e., one test EmplId (828157, the same number used in the PS Query example)
            3. The file, named **External File 828157 one row**, in its entirety, appears as follows:

	A	B	C	D	E	F	G	H	I
1	Institution	ID	Last Name	First Name	Wesleyan Class	Enrol Status	Balance	Email	
2	Wesleyan	828157	TESTNAME	Original	None	TEST	154.32	otestname@wesleyan.edu	
3									
4									

            4. Note the location of the field named **ID**. That is the only field that will be referenced on the **Mass Assign** page. It correlates with the **EmplId** field.

        ii. **Open the Mass Assign page in PeopleSoft in order to Mass Assign Service Indicators**
            Navigation: Main Menu > Campus Community > Service Indicators (Student) > Mass Assign
            1. If there is an existing Run Control, select it; otherwise, create and add a new Run Control.

1. Below are the main sections on the Mass Assign page:
   a. **Population Selection**
   b. **Service Indicator Data**
   c. **Effective Period**
   d. **Assignment Details**
   e. **Contact Information**
   f. **Comments**
2. **Population Selection section**
   a. The first field is Selection Tool. It is a drop down that when clicked displays the tools that were set up in the Context Definition. Choose External File from the dropdown box.

   b. Once a tool is selected, links will be made available to aid in the Selection Tool creation.
   c. When External File is chosen, the **Population Selection** area has this appearance.

d. Click on the **Upload File** button and then click on **Browse** for the external load
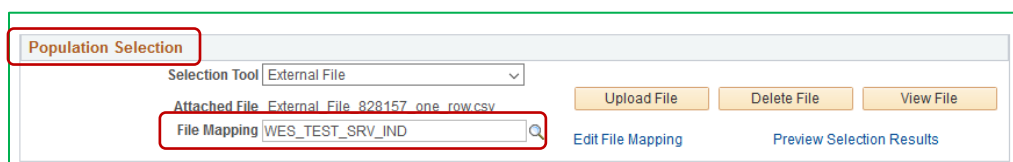   file, in this example, **External File 828157 one row.csv**.
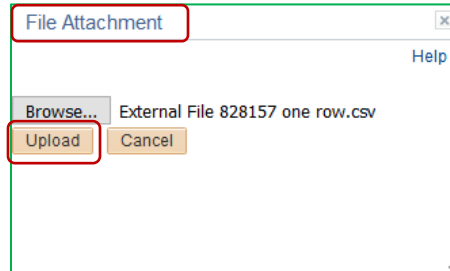
e. When you locate the file, click the **Upload** button.
f. Once you have done so, the file name will appear as follows next to the label
    Attached File. Note that you can delete the file or view the file using the other
    buttons on that row.
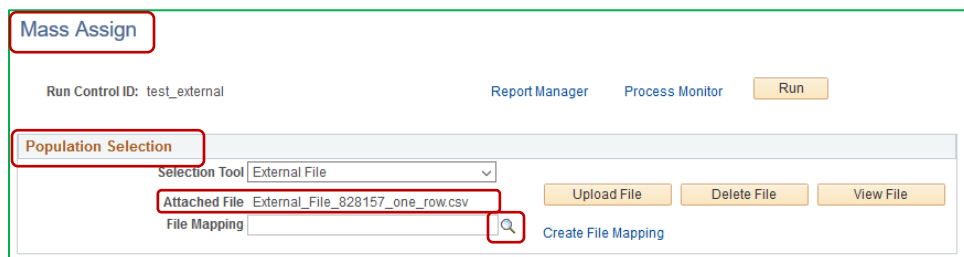
g. Click on the **File Mapping** magnifying glass to see any existing File Mapping
    Names in the **Look Up File Mapping** page.
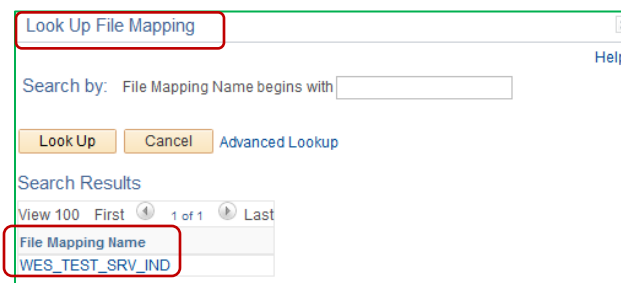
h. Select the File Mapping Name **WES_TEST_SRV_IND**. Doing so changes the
    appearance of the **Population Selection** box to this:

3. **Service Indicator Data** section
   a. The **Institution** should be default to Wesleyan University. If not, select it.
   b. **Service Indicator Code** – click on the magnifying glass to see a listing of Holds entitled **Look Up Service Indicator Code**:

Service Indicator Cd	Description
ACF	Academic Affairs
ADM	Undergraduate Admission
CAT	University Course Catalog
DN	Dean's Office
FA	Financial Aid
GLI	GLSP Informational
GLS	Graduate Liberal Studies
HC	Health Center
HC2	Health Center Info Only
I-9	I-9 Form
NAP	No Online Appt - Noncompliance
NEW	New Student Staff
OIS	Center for Global Studies
PAR	Parent/Guardain
PHN	Onl & Print Directory Opt-Outs
PLT	Teaching Evaluation
REG	Registrar's Office
RLI	Residential Life Informational
SA	Student Accounts Office
SAA	Student Accts Informational
SCF	Drop/Add Schedule Confirmation
SCI	Drop/Add Schedule Incorrect
SIS	Registrar's Enrollment Holds
STF	Professional Staff
SUR	Survey Compliance
TEC	Teaching Evaluation Compliance
TEV	Teaching Evaluation Video
TRN	Transcript Hold
WTR	Wes Transcript Received

Search Results — View 100   First   1-29 of 29   Last

   i. Select the appropriate **Code**. For this example, it is DN (Dean's Office).
   c. **Reason** – Click on the magnifying glass. The **Reasons** associated with the selected Code are listed on a page entitled **Look Up Reason**.

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> i. Select the appropriate **Reason**. For this example, it is HCODE (No Honor Code Card).

  d. **Use System Date** – You can check to use today's date or leave blank.
  e. The **Service Indicator Data Section** now resembles this:

4. **Effective Period**
  a. **Start Term** – defaults to 0000
  b. **End Term** – default is blank
  c. **Start Date** – REQUIRED
  d. **End Date** – default is blank

5. **Assignment Details**
  a. **Department** – the number for the Department associated with the Service Indicator Reason/Code is automatically filled in
  b. **Reference** – default is blank
  c. **Amount** – A currency amount can be entered

    d. **Currency Code** - if the amount field is populated, select the appropriate Currency. The default is USD.

6. **Contact Information**
   a. **Contact ID** – default is blank
   b. **Contact Person** – default is blank
   c. **Placed Person ID** – EmplId of User who places this hold
   d. **Placed By** – Name of User who places this hold
7. The page now appears similar to the following. You may Save the page at this time before running the process or wait until it has completed running.

8. Always select the Preview Selection Results link to see the output.

9. Running the Process
   a. This is similar to other processes you may have run. Click the yellow **Run** button at the top.
   b. When the **Process Scheduler Request** page opens, only check the **Select** box next to **SCC_SI_ASSN**, and click **OK**. If you select the other box, it may cause unexpected results**.**

   c. You will be returned to the **Mass Assign** page. The top of the page now resembles this:

   d. Click on the **Process Monitor** link, and when the Process page opens, click **Refresh** until the Run Status = Success and the Distribution Status = Posted.
   e. Save the **Run Control -** If you haven't already, click Save in order to save the Run Control for later use.
10. To see the results of this **Mass Assign**, you can create a query that will display the students who have the Service Indicator and Reason associated with their EmplID.
    a. (If you have access, you can run the query WSI_STUDENTS_HOLD_PROMPTED which will prompt you for the Service Indicator Reason name.)

11. To see the results for one individual, open the Manage Service Indicators page for one student who appears on the original query. You can see the results of this process below. *Navigation: Main Menu > Campus Community > Service Indicators (Student) >Manage Service Indicators*

Manage Service Indicators

TESTNAME,Original   Class None   828157

Display   Effect All ▽   Institution Wesleyan University ▽   Refresh ↻

➕ Add Service Indicator

Service Indicator Summary   Personalize | Find | View All | 🔲 | 🔳   First ⬆ 1-5 of 5 ⬇ Last

Code	Code Description	Reason Description	Institution	Start Term		End Term	End Term Description	Start Date	End Date
DN	Dean's Office	No Honor Code Card	WSLYN	0000	Begin Term			07/11/2018	

APPENDIX A

Module	Application Processes (Modules not used at Wesleyan are grayed out)
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 Update
CC	Process Student Groups
CC	Service Indicator Person Mass Assign
CC	Service Indicator Organization Mass Assign
CC	Service Indicator Person Mass Release
CC	Service Indicator Organization Mass Release
FA	Aid Year Activate
FA	Mass Packaging Select
FA	Select Students for Need Summary Validation
FA	Select Students for Repackaging
FA	Process Satisfactory Academic Progress (SAP)
FA	SF External Award Feed
SF	Mass Contract Select
SR	Process Transcripts and Batch Transcript Request