

Batch Service Indicators

This guide is for staff. It describes how to add and remove service indicators for a group of students. In Campus Solutions, holds are known as negative service indicators.

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Create Run Control

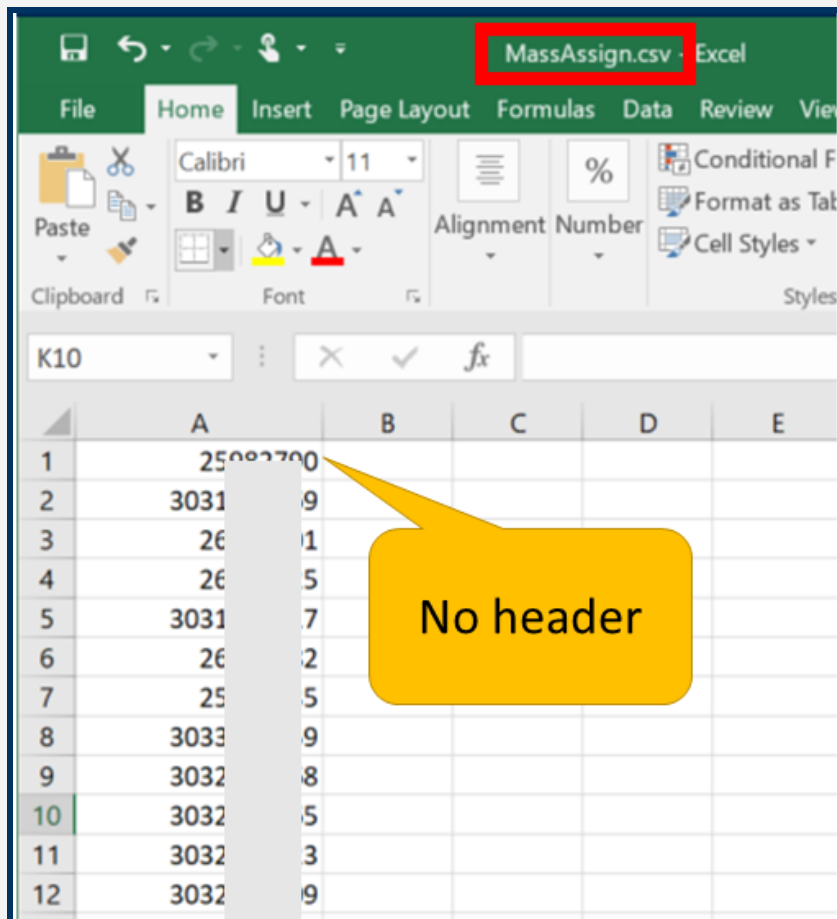
Initial setup only. Afterwards, same run control may be re-used for both Mass Assign or Mass Release.

1. **NavBar > Navigator > Campus Community > Service Indicator (Student) > Mass Assign**
2. Select **Add a New Value** tab
3. Enter name for **Run Control ID** in box. Example: JW_AdvisingHolds
4. Select **Add**

The screenshot shows the 'Berkeley SND' interface for 'Mass Assign'. It features two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected. Below the tabs is a text input field for 'Run Control ID' containing the text 'UCCS_V_SI_BATCH_ASSIGN'. At the bottom is an 'Add' button. Red boxes and numbers highlight the steps: 1. 'Add a New Value' tab, 2. 'Run Control ID' field, 3. 'Add' button.

Create CSV

1. The uploaded file must be a CSV. This can be created in Excel, but must be saved as a .csv file. Please see [Create CSV File](#) for details.
2. List all desired student ID numbers in column A. Do not include any header or title. There should be no spaces, dashes or other characters in the student ID, only numbers.



Mass Assign

1. **NavBar > Navigator > Campus Community > Service Indicator (Student) > Mass Assign**
2. Within the **Population Selection** section, go to **Selection Tool** and choose **External File**.
3. Select **Upload File** (must be CSV file). See below for examples of how to format the CSV.

4. Select **Choose File**
5. Choose desired file from your desktop and select **Upload**

6. Now enter the following data in the correct fields:
 - a. File Mapping: **EMPLID ONLY NO HEADER**
 - b. Service Indicator Code: **V00**

Note: If V00 or Reason Code is not available, contact SIS Help to review your security access.

- c. Reason: Select one option from **Magnifying Glass**

Start Term & End Term: Enter a **term code**

Note: Best practice is to include an end term or end date. For example, to target a specific term for enrollment hold, enter the same term code in the Start Term and End Term fields.

7. Select **Run**

The screenshot shows the 'Mass Assign' form. At the top, there are links for 'Report Manager' and 'Process Monitor', and a 'Run' button highlighted with a red box and labeled '10.'. Below this is the 'Population Selection' section, where 'File Mapping' is set to 'EMPLID ONLY NO HEADER' (labeled '9a.'). The 'Service Indicator Data' section shows '*Institution' as 'UC Berkeley', '*Service Indicator Code' as 'V00' (labeled '9b.'), and '*Reason' as 'ADVHD'. The 'Effective Period' section shows 'Start Term' as '2192' (labeled '9c.') and 'End Term' as '2192'. The 'Assignment Details' section shows '*Department' as 'UCBKL' and 'Amount' as '0.000'. The 'Contact Information' section is at the bottom.

8. Select **Publish Assign Service Ind** and select **OK**.

The screenshot shows the 'Process Scheduler Request' form. At the top, there are fields for 'User ID' (161263) and 'Run Control ID' (UCCS_V_SI_BATCH_ASSIGN). Below this are fields for 'Server Name', 'Run Date' (01/02/2019), 'Recurrence', 'Run Time' (4:19:13PM), and 'Time Zone'. A 'Reset to Current Date/Time' button is also present. The 'Process List' section contains a table with two rows: 'Publish Assign Service Ind' (selected with a red box) and 'SCC_SI_ASSN'. The 'OK' button is highlighted with a red box at the bottom.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	Publish Assign Service Ind	EIPSIASG	PSJob	(None)	(None)	Distribution
☐	SCC_SI_ASSN	SCC_SI_ASSN	Application Engine	Web	TXT	Distribution

9. Select **Process Monitor** to see the status of the job. Select **Go Back to Mass Assign** to return.

The screenshot shows the 'Mass Assign' interface. At the top, there's a 'Run Control ID' field with the value 'UCCS_V_SI_BATCH_ASSIGN'. Below this, there are tabs for 'Report Manager' and 'Process Monitor'. The 'Process Monitor' tab is selected and highlighted with a red box. A red arrow points from this tab to the 'Process List' table below. The 'Process List' table has columns for 'Select', 'Instance', 'Seq.', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. It contains two rows of data for PSJob processes. At the bottom of the 'Process Monitor' section, there is a 'Go back to Mass Assign' link highlighted with a red box, along with 'Save' and 'Notify' buttons.

Mass Assign

Run Control ID UCCS_V_SI_BATCH_ASSIGN

Report Manager Process Monitor

Population Selection

Selection Tool External File

Attached File MassAssign.csv

File Mapping EMPLID ONLY NO HEADER

Upload File Delete File

Service Indicator Data

Process List Server List

View Process Request For

User ID 161263 Type Last 1 Days Refresh

Server Name Instance From Instance To

Run Status Distribution Status Save On Refresh

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	7352889		PSJob	EIPSIASG	161263	01/02/2019 4:26:14PM PST	Success	Posted	Details
☐	7352886		PSJob	EIPSIASG	161263	01/02/2019 4:19:13PM PST	Success	Posted	Details

Go back to Mass Assign

Save Notify

Process List | Server List

Mass Release

1. NavBar > Navigator > Campus Community > Service Indicator (Student) > Mass Release
2. If you are creating a release for a new set of students, use the **Add a New Value** tab and follow the steps above, under **Create Run Control**. Then go to Step 5.
3. Otherwise, if you already created a run control for Mass Assign, you can search to reuse it. Enter the Run Control ID.

Example: **UCCS_V_SI_BATCH_ASSIGN**

4. Select **Search**.

The screenshot shows the 'Berkeley SND' header and a 'Mass Release' section. Below the header, there's a text prompt: 'Enter any information you have and click Search.' followed by two buttons: 'Find an Existing Value' and 'Add a New Value'. A yellow callout bubble points to the 'Add a New Value' button with the text: 'If you are working with a new set of students, click here and follow the steps for **Create Run Control (above)**.' Below this is a 'Search Criteria' dropdown menu. Underneath, the 'Search by:' field is set to 'Run Control ID begins with' and the input field contains 'UCCS_V_SI_BATCH_ASS', which is highlighted with a red box and labeled '3.'. Below the input field is a 'Case Sensitive' checkbox. At the bottom, there are two buttons: 'Search' (highlighted with a red box and labeled '4.') and 'Advanced Search'.

5. Select **Service Indicator** you wish to remove. Confirm the following fields are correct: **Attached File**, **File Mapping**, and **Start Term / End Term**. For details, see Step 9 of **Creating Holds by Batch** (above).
6. Select **Run**.

The screenshot shows the 'Mass Release' configuration page. At the top, there's a 'Run Control ID' field with the value 'UCCS_V_SI_BATCH_ASSIGN'. To the right are links for 'Report Manager', 'Process Monitor', and a 'Run' button (highlighted with a red box). Below this is the 'Population Selection' section, which includes a 'Selection Tool' dropdown set to 'External File', an 'Attached File' field with 'Math_SI_2192_Vicky.csv', and a 'File Mapping' dropdown set to 'EMPLID ONLY NO HEADER'. There are buttons for 'Upload File', 'Delete File', and 'View File'. Below the 'Population Selection' section is the 'Service Indicator Data' section, which includes a '*Institution' dropdown set to 'UC Berkeley', a '*Service Indicator Code' field with 'V00' (highlighted with a red box), and a '*Reason' dropdown set to 'ADVHD'. Below the 'Service Indicator Data' section is the 'Effective Period' section.

7. Select **Publish REL Service Ind** and select **OK**.

Process Scheduler Request

User ID 161263 Run Control ID UCCS_V_SI_BATCH_ASSIGN

Server Name Run Date 01/03/2019

Recurrence Run Time 11:01:05AM

Time Zone

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	Publish REL Service Ind	EIPSIRLS	PSJob	(None)	(None)	Distribution
☐	SCC_SI_RELS	SCC_SI_RELS	Application Engine	Web	TXT	Distribution

8. The service indicators should be removed. To confirm, check the **Process Monitor**.