

How to Assign and Release College Enrollment Holds

Tutorial

Audience: College Advisers

Summary

This document explains how to add and remove college enrollment holds (service indicators) on a large group of students from a particular college. The college adviser creates a spreadsheet file of the students who have holds to be removed, and uploads the spreadsheet into AIS using the Mass Assign or Mass Release process.

Originator

Student Records Systems, Office of the Registrar (regsys.ucsc.edu)

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Mass Assigning College Enrollment Holds: Introduction

This document tells college advisors how to place a hold (service indicator) on a whole group of students in one process. Do this by:

1. Creating a .csv spreadsheet file with the student IDs of the students with holds to be placed.
2. Finding the Mass Assign process in AIS and looking up your run control (or creating a new one).
3. Uploading the .csv file
4. Entering parameters that the process needs: the kind of hold, the reason, and other information.
5. Running the process to place enrollment holds on the students whose IDs you uploaded.

Step 1: Create Your .csv File

Create a .csv file. Start with an Excel spreadsheet:

- The spreadsheet must contain no header row.
- The first column of each row holds the student ID number. This column should be formatted as text so that Excel retains the leading 0 (zero) on any ID that begins with zero. (This is necessary for correct processing.) Do not include the “W” in front of the ID number; just the number itself.

Correct:

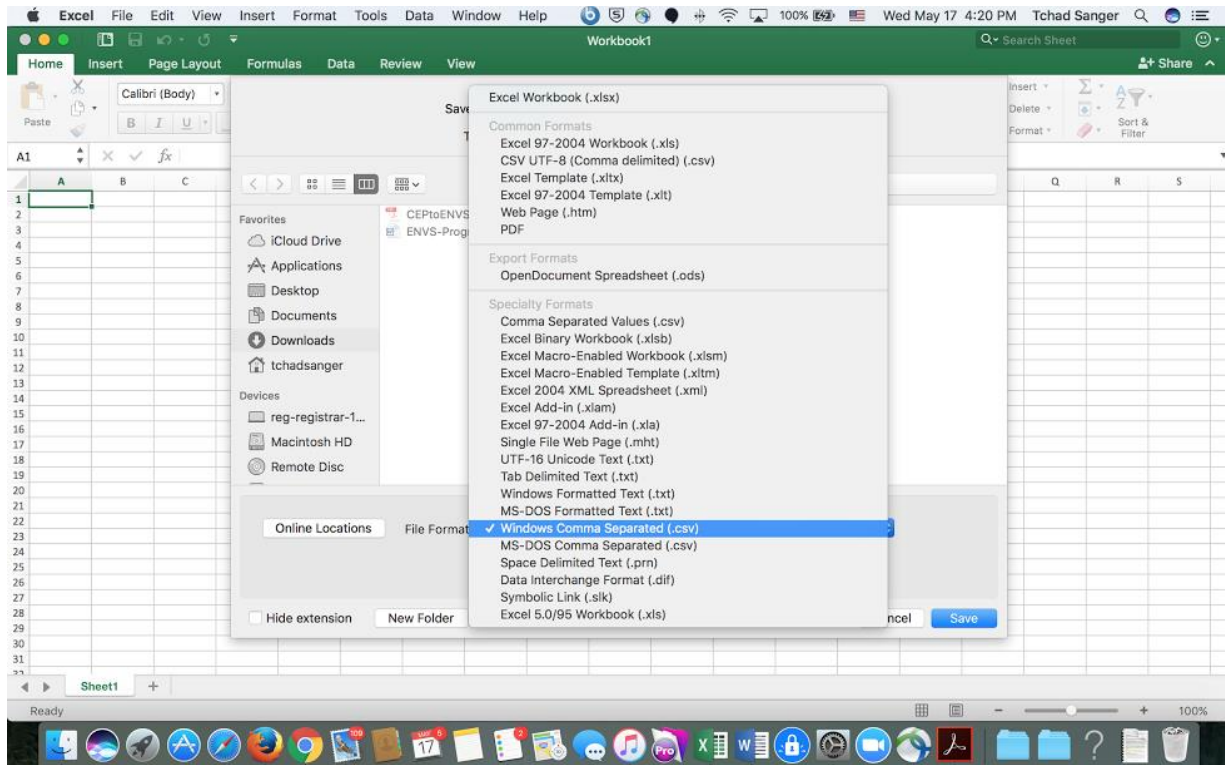
	A	B
1	9999999	Mickey Mouse
2	1392008	Homer Simpson
3	1440987	Sammy Slug
4	0123456	Fred Flintstone

Incorrect:

	A	B
1	Id Number	Name
2		Mickey Mouse
3	W1392008	Homer Simpson
4	N/A	Sammy Slug
5	123456	Fred Flintstone

- It is OK, but not required, to have data in any other columns. The Mass Assign process only reads the first column. Data in all other columns is ignored.

- Use Excel's Save As... menu option to save the file in CSV format. The filename cannot contain spaces. It is good practice to use a different file name every time you do an upload so that you can look back at your saved run control and tell which file you last processed.
- **When doing Save as... on a Macintosh, it is imperative that you choose the file format "Windows Comma Separated (.csv)".** Otherwise, AIS will not be able to process the file. See the example below.



Step 2: Find Your Run Control

If this is the first time you've run this procedure, you must go to the Mass Assign Process in AIS and make a run control. If you've previously saved a run control, you go to the process in AIS and look it up.

The first time you assign holds: Making a Run Control

A run control is a saved page that contains all the parameters required to run a report or process. You will be creating a run control and saving it with a name that will be visible as a menu choice only to you.

Every subsequent time that you run the Mass Assign process, you will be able to use your existing run control, which already has some of the fields filled in. This saves you time, and ensures that you run the process consistently.

Follow this procedure:

1. Navigate to Campus Community > Service Indicators (Student) > Mass Assign
2. Click on the Add a New Value Tab and enter a Run Control ID: a name for your new run control.

Mass Assign

The screenshot shows the 'Mass Assign' interface. At the top, there are 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 labeled 'Run Control ID' containing the text 'mass_assign_COL'. Below the input field is an orange 'Add' button.

You can use the name shown in the example, or any name you choose; there can be no spaces within the name.

No one else can see or use your run controls, so the name should be relevant to you so that you can find this run control the next time you run the Mass Assign process.

3. Click the Add Button

Now fill out the run control fields. See Step 3.

If you've assigned holds before: Looking Up a Run Control You've Already Saved

If you have already created and saved a run control, you can reuse it to save yourself some time.

1. Navigate to Campus Community > Service Indicators (Student) > Mass Assign.
2. Search for your existing run control on the **Find an Existing Value** tab.
3. Enter the full name or just the beginning of the name of your existing run control, and click the **Search** button.
 - If only one run control matches the name you entered, it appears on the screen.

- If more than one run control matches a partial name that you've entered, choose your run control from the list that appears.

Mass Assign

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

Choose the Find an Existing Value tab.

Enter the name - or part of the name - of your run control.

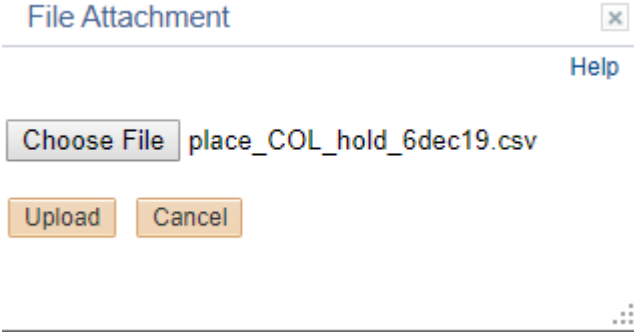
Click the Search button.

Step 3: Fill out the Mass Assign run control and upload your file.

Once you have your Mass Assign run control on the screen, fill it out as shown below. The screen images tell you what the screen's fields look like, and the tables tell you how to fill them out.





Mass Assign

FIELD NAME	The Value You Click or Enter
Selection Tool:	External File

<p>Attached File:</p>	<ol style="list-style-type: none"> 1. Click Upload File. 2. Click Choose File. Browse to and select your .csv file. 3. Click Open. 4. Click Upload.  <p>Important: This file gets saved with your run control. The next time you use this run control, you must click Upload File again to load your new file. The new file will overwrite the old file.</p>						
<p>File Mapping:</p>	<p>COLLEGE_ASSIGN</p> <p>After selecting the File Mapping, click on the Preview Selection Results link to view your file.</p> <p>Preview Selection Results</p> <p>Return</p> <table border="1" data-bbox="693 1247 1438 1335"> <thead> <tr> <th></th> <th>EMPLID</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1392008</td> </tr> <tr> <td>2</td> <td>0193064</td> </tr> </tbody> </table> <p>You should see one column labeled EMPLID, with a list of the IDs in your file. Click the Return button to go back to your run control.</p>		EMPLID	1	1392008	2	0193064
	EMPLID						
1	1392008						
2	0193064						

Service Indicator Data	
*Institution	UC Santa Cruz
*Service Indicator Code	COL College Enrollment Hold
*Reason	CAADV Academic Advising

FIELD NAME	The Value You Click or Enter
Institution:	UC Santa Cruz
Service Indicator Code:	COL College Enrollment Hold
Reason:	<p>Choose the appropriate reason code for the holds you are placing:</p> <p>CAADV Academic Advising</p> <p>CACMP C1/C2 Enrollment Hold</p> <p>CAMIN Minimum Progress</p> <p>CAPRG Academic Progress</p> <p>CAREA Readmission Hold</p> <p>CAUND Undeclared Major</p> <p>CAWRT Writing Enrollment Hold</p>

Effective Period	
Start Term <input type="text" value="0000"/>  Begin Term - Srvc Indicatr Use	End Term <input type="text"/> 
Start Date <input type="text" value="12/06/2019"/> 	End Date <input type="text"/> 

FIELD NAME	The Value You Click or Enter
Start Term, End Term, Start Date and End Date:	<p>This section will be pre-populated with the default values for the hold that you are placing. Generally you will not need to change these values.</p> <p>The Start Term of 0000, or a blank value for Start Term, means that the hold will be effective immediately. Optionally, you may enter the four-digit term code for the term for which you wish to place the enrollment hold, if you do not want your hold to be immediately impactful.</p>

Assignment Details	
*Department	ACADCOLLEG Academic Colleges
Reference	<input type="text"/>
Amount	<input type="text" value="0.000"/>
Currency Code	USD Dollar
Contact Information	
Contact ID	9999992
Contact Person	College,Porter
Placed Person ID	<input type="text"/>
Placed By	<input type="text"/>
Comments	
<div style="border: 1px solid gray; height: 80px;"></div>	

FIELD NAME	The Value You Click or Enter
Department:	This field will be pre-populated with the default value for the hold that you are placing. Generally you will not need to change these values.
Contact ID:	<p>If you want contact information to be visible to the student, enter the appropriate ID:</p> <ul style="list-style-type: none"> 9999992 Porter College 9999987 College Ten 9999993 Merrill College 9999996 Cowell College 9999990 Oakes College 9999995 Stevenson College 9999994 Crown College 9999991 Kresge College 9999988 College Nine 9999989 Rachel Carson College

Now click **Save** to save your run control.

Step 4: Run the Process to Assign the Holds

1. When you have confirmed that all the values in your run control are correct, click **Run**.

Mass Assign

Run Control ID mass_assign_COL Report Manager Process Monitor **Run**

Population Selection

Selection Tool External File

Attached File place COL hold 6dec19.csv Upload File Delete File

2. The Process Scheduler appears. Check the box next to **SCC_SI_ASSN**. Then click **OK** to run the process immediately.

Process Scheduler Request

User ID 1392008 Run Control ID mass_assign_COL

Server Name Run Date 12/06/2019

Recurrence Run Time 3:14:39PM Reset to Current Date/Time

Time Zone

Process List

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

3. AIS now returns to your run control. At any time click the **Process Monitor** link to view the status of your request. Your Mass Release process is the top item on the list of processes.

Mass Assign

Run Control ID mass_assign_COL Report Manager **Process Monitor** Run

Process Instance:2413587

4. On the Process Monitor page, click the Refresh button from time to time to see the current Run Status of your process. (The Process Scheduler does not automatically update itself.)

Process List | Server List

View Process Request For

User ID: 1392008 | Type: | Last: | 3 Days | Refresh

Server: | Name: | Instance From: | Instance To: | Report Manager

Run Status: | Distribution Status: | Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2413586		Application Engine	SCC_SI_ASSN	1392008	12/06/2019 3:14:39PM PST	Success	Posted	Details

- When the Run Status = **Success**, the Mass Assign process is complete. Verify the successful assignment of enrollment holds by looking up a few students and checking that the service indicator for this hold exists.

Mass Releasing College Enrollment Holds: Introduction

This document tells college advisors how to remove a hold (service indicator) from a whole group of students in one process. Do this by:

- Creating a .csv spreadsheet file with the student IDs of the students with holds to be removed.
- Finding the Mass Release process in AIS and looking up your run control (or creating a new one).
- Uploading the .csv file
- Entering parameters that the process needs: the kind of hold, the reason, and other information.
- Running the process to release holds from the students whose IDs you uploaded.

Step 1: Create Your .csv File

Create a .csv file. Start with an Excel spreadsheet:

- The spreadsheet must contain no header row.

- The first column of each row holds the student ID number. This column should be formatted as text so that Excel retains the leading 0 (zero) on any ID that begins with zero. (This is necessary for correct processing.) Do not include the “W” in front of the ID number; just the number itself.

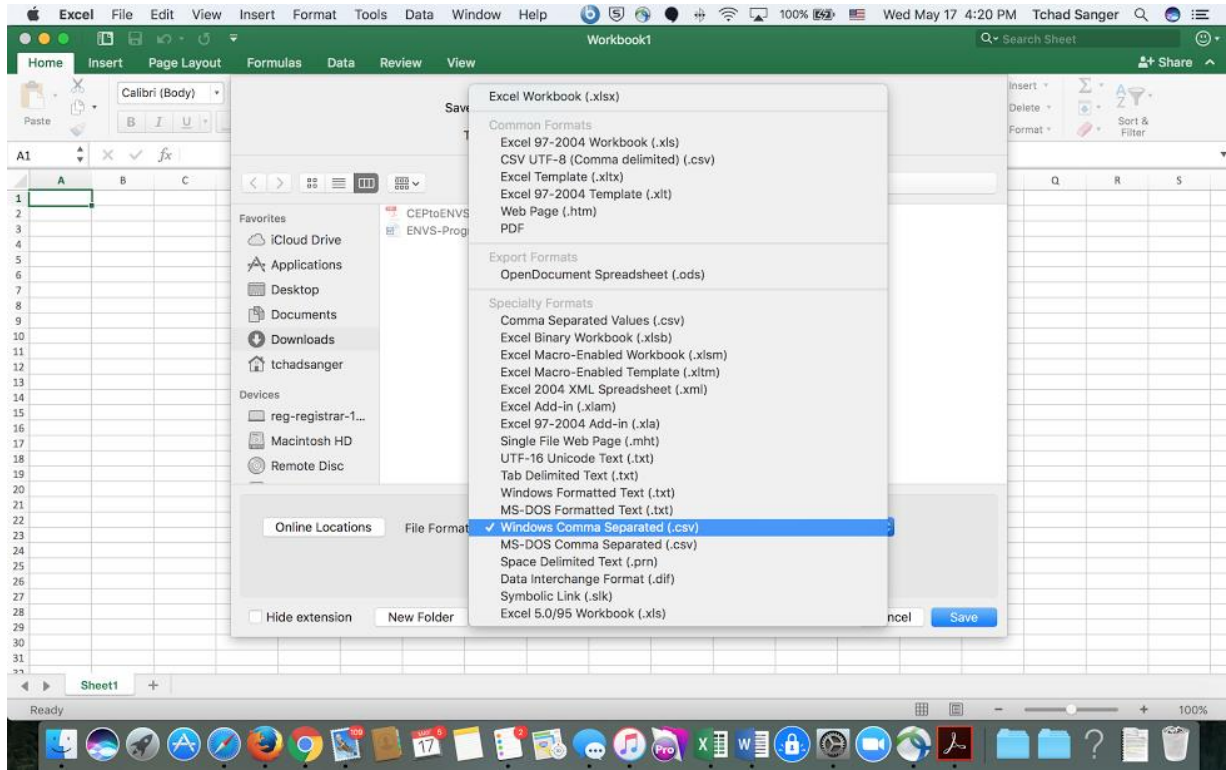
Correct:

	A	B
1	9999999	Mickey Mouse
2	1392008	Homer Simpson
3	1440987	Sammy Slug
4	0123456	Fred Flintstone

Incorrect:

	A	B
1	Id Number	Name
2		Mickey Mouse
3	W1392008	Homer Simpson
4	N/A	Sammy Slug
5	123456	Fred Flintstone

- It is OK, but not required, to have data in any other columns. The Mass Release process only reads the first column. Data in all other columns is ignored.
- Use Excel’s Save As... menu option to save the file in CSV format. The filename cannot contain spaces. It is good practice to use a different file name every time you do an upload so that you can look back at your saved run control and tell which file you last processed.
- When doing Save as... on a Macintosh**, it is imperative that you choose the file format “**Windows Comma Separated (.csv)**”. Otherwise, AIS will not be able to process the file. See the example below.



Step 2: Find Your Run Control

If this is the first time you've run this procedure, you must go to the Mass Release Process in AIS and make a run control. If you've already made a run control, you go to the process in AIS and look it up.

The first time you remove holds: Making a Run Control

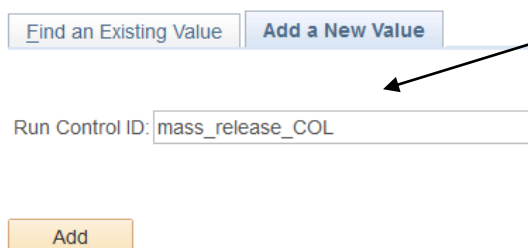
A run control is a saved page that contains all the parameters required to run a report or process. You will be creating a run control and saving it with a name that will be visible as a menu choice only to you.

Every subsequent time that you run the Mass Release process, you will be able to use your existing run control, which already has some of the fields filled in. This saves you time, and ensures that you run the process consistently.

Follow this procedure:

1. Navigate to Campus Community > Service Indicators (Student) > Mass Release
2. Click on the Add a New Value Tab and enter a Run Control ID: a name for your new run control:

Mass Release



The screenshot shows the 'Mass Release' interface. At the top, there are 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 labeled 'Run Control ID:' containing the text 'mass_release_COL'. Below the input field is an orange 'Add' button. An arrow points from the 'Add a New Value' tab to the input field.

You can use the name shown in the example, or any name you choose; there can be no spaces within the name.

No one else can see or use your run controls, so the name should be relevant to you so that you can find this run control the next time you run the Mass Release process.

3. Click the Add Button

Now fill out the run control fields. See Step 3.

If you've removed holds before: Looking Up a Run Control You've Already Saved

If you have already created and saved a run control, you can reuse it to save yourself some time.

1. Navigate to Campus Community > Service Indicators (Student) > Mass Release.

Mass Release

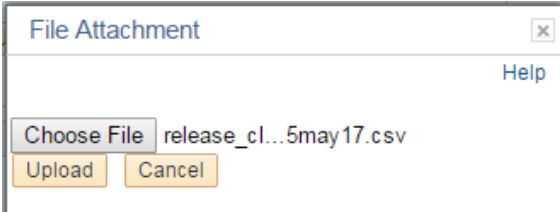
Enter any information you have and click Search. Leave fields blank for a list of all values.

The screenshot shows the 'Mass Release' search interface. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. An arrow points to the 'Find an Existing Value' tab with the text 'Choose the Find an Existing Value tab.' Below the tabs is a 'Search Criteria' section with a dropdown menu set to 'begins with' and a text input field containing 'mass_release_COL'. An arrow points to this input field with the text 'Enter the name - or part of the name - of your run control.' Below the input field is a checkbox for 'Case Sensitive' and a text input for 'Limit the number of results to (up to 1000):' with the value '300'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. An arrow points to the 'Search' button with the text 'Click the Search button.'

2. Search for your existing run control on the **Find an Existing Value** tab.
3. Enter the full name or just the beginning of the name of your existing run control, and click the **Search** button.
 - If only one run control matches the name you entered, it appears on the screen.
 - If more than one run control matches a partial name that you've entered, choose your run control from the list that appears.

Step 3: Fill out the Mass Release run control and upload your file.

Once you have your Mass Release run control on the screen, fill it out as shown below. The screen images tell you what the screen’s fields look like, and the tables tell you how to fill them out.

FIELD NAME	The Value You Click or Enter
Selection Tool:	External File
Attached File:	<ol style="list-style-type: none"> 1. Click Upload File. 2. Click Choose File. Browse to and select your .csv file. 3. Click Open. 4. Click Upload.  <p>Important: This file gets saved with your run control. The next time you use this run control, you must click Upload File again to load your new file. The new file will overwrite the old file.</p>

FIELD NAME	The Value You Click or Enter						
File Mapping:	<p>COLLEGE_RELEASE</p> <p>After selecting the File Mapping, click on the Preview Selection Results link to view your file.</p> <p>Preview Selection Results</p> <p><input type="button" value="Return"/></p> <table border="1"> <thead> <tr> <th></th> <th>EMPLID</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1392008</td> </tr> <tr> <td>2</td> <td>0193064</td> </tr> </tbody> </table> <p>You should see one column labeled EMPLID, with a list of the IDs in your file. Click the Return button to go back to your run control.</p>		EMPLID	1	1392008	2	0193064
	EMPLID						
1	1392008						
2	0193064						

Service Indicator Data	
*Institution	<input type="text" value="UC Santa Cruz"/>
*Service Indicator Code	<input type="text" value="COL"/> College Enrollment Hold
*Reason	<input type="text" value="CAADV"/> Academic Advising

FIELD NAME	The Value You Click or Enter
Institution:	UC Santa Cruz
Service Indicator Code:	COL College Enrollment Hold
Reason:	<p>Choose the appropriate reason code for the holds you are releasing:</p> <p>CAADV Academic Advising</p> <p>CACMP C1/C2 Enrollment Hold</p> <p>CAMIN Minimum Progress</p> <p>CAPRG Academic Progress</p> <p>CAREA Readmission Hold</p> <p>CAUND Undeclared Major</p> <p>CAWRT Writing Enrollment Hold</p>

Effective Period			
Start Term	<input type="text"/>	End Term	<input type="text"/>
Start Date	<input type="text"/>	End Date	<input type="text"/>

FIELD NAME	The Value You Click or Enter
Start Term:	<p>Generally you will be able to leave this section blank, and the process will remove all holds of the type specified above, for all the students on your list (and only the students on your list.)</p> <p>Optionally, you may enter the four-digit term code for the term for which you wish to remove the enrollment hold, if your hold has a start term.</p>

Now click **Save** to save your run control.

Step 4: Run the Process to Release the Holds

1. When you have confirmed that all the values in your run control are correct, click **Run**.

Mass Release

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

Population Selection

Selection Tool:

Attached File: release_clg_holds_15may17.csv

2. The Process Scheduler appears. Click **OK** to run the process immediately.

Process Scheduler Request

User ID 1343693 Run Control ID mass_release_COL

Server Name Run Date

Recurrence Run Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	SCC_SI_RELS	SCC_SI_RELS	Application Engine	Web	TXT	Distribution

3. AIS now returns to your run control. At any time click the **Process Monitor** link to view the status of your request. Your Mass Release process is the top item on the list of processes.

Mass Release

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

Process Instance:1722490

4. Click the Refresh button from time to time to see the current Run Status of your process. (The Process Scheduler does not automatically update itself.)

Process List

View Process Request For

User ID Type Last Days

Server Name 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
<input type="checkbox"/>	1400634		Application Engine	SCC_SI_RELS	1392008	01/13/2016 3:42:47PM PST	Success	Posted	Details

- When the Run Status = **Success**, the Mass Release process is complete. Verify the successful release of enrollment holds by looking up a few students and checking that the service indicator for this hold is gone.

Questions or Suggestions?

If you have any questions about this process, or suggestions for improving the documentation, please email the Registrar Systems Team at regsys@ucsc.edu.