How to Release College Enrollment Holds

Tutorial

Audience: College Advisers

Summary

This document explains how to 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 through the Mass Release process.

Originator

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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:

1. Creating a .csv spreadsheet file with the student IDs of the students with holds to be removed.

2. Finding the Mass Release 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 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.
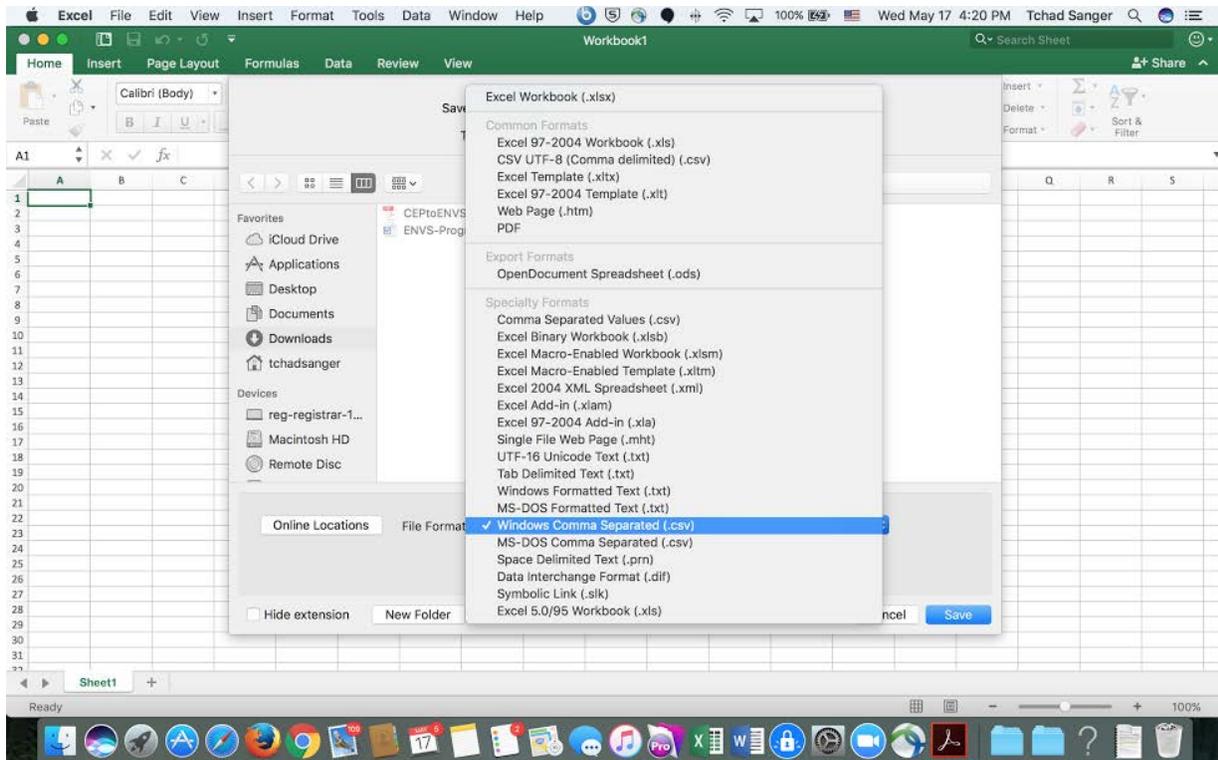
Step 2: Find Your Run Control

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. From the MyUCSC NavBar go to: Navigator button > 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
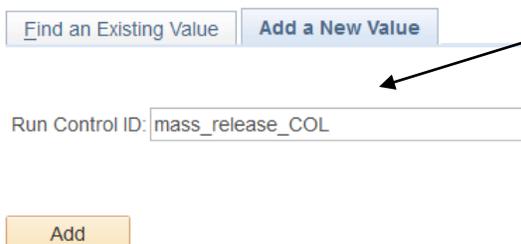
| Find an Existing Value | **Add a New Value** |

Run Control ID: mass_release_COL

Add

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. From the MyUCSC NavBar go to: Navigator button > 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.

Find an Existing Value	Add a New Value

▼ **Search Criteria**

Run Control ID: begins with ▼ | mass_release_COL

☐ Case Sensitive

Limit the number of results to (up to 1000): 300

| Search | Clear | Basic Search 🔍 Save Search Criteria |

Choose the Add a New Value tab.

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

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:	1. Click **Upload File**. 2. Click **Choose File**. Browse to and select your .csv file. 3. Click **Upload**. **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.

FIELD NAME	The Value You Click or Enter
File Mapping:	**COLLEGE_RELEASE** After selecting the File Mapping, click on the **Preview Selection Results** link to view your file. Preview Selection Results [Return] |	EMPLID | | 1 | 1392008 | | 2 | 0193064 | 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.

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:	Choose the appropriate reason code for the holds you are releasing: **CAADV** Academic Advising **CACMP** C1/C2 Enrollment Hold **CAMIN** Minimum Progress **CAPRG** Academic Progress **CAREA** Readmission Hold **CAUND** Undeclared Major **CAWRT** Writing Enrollment Hold

Effective Period

Start Term	[blank] 🔍	End Term	[blank] 🔍
Start Date	[blank] 📅	End Date	[blank] 📅

FIELD NAME	The Value You Click or Enter
Start Term:	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.) 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.

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:	External File ▼	
Attached File:	release_clg_holds_15may17.csv	Upload File Delete File View File

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 05/31/2017 📅

Recurrence [▼]   Run Time 12:57:16PM   Reset to Current Date/Time

Time Zone [🔍]

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☑	SCC_SI_RELS	SCC_SI_RELS	Application Engine	Web ▼	TXT ▼	Distribution

OK   Cancel

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.)

5. 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.

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