



CARDINAL STATION SERVICE INDICATOR MASS ASSIGN INSTRUCTIONS

MASS ASSIGN VIA A QUERY

See next section for instructions for assigning from an uploaded excel file.

Navigation: Campus Community > Service Indicators (Student) > Mass Assign

Note: The first time you run the process you will need to add a new run control.

1. Select PS Query from the drop down menu. Type the name of query that pulls the population to receive the hold. (Note: 9_ENGR_MASS_ASSIGN_SRVC_IND is an example only -- use the query that is specific to your needs.)

2. If your query has prompts, Click Edit prompts, update the values and click OK.

6. Click Run.

The screenshot shows a web application interface for assigning service indicators. It is divided into several sections:

- Population Selection:** Includes a 'Selection Tool' dropdown set to 'PS Query' and a 'Query Name' field containing '9_ENGR_MASS_ASSIGN_SRVC_IND'. There are links for 'Edit Prompts', 'Launch Query Manager', and 'Preview Selection Results'.
- Service Indicator Data:** Includes fields for '*Institution' (The Catholic Univ of America), '*Service Indicator Code' (ADV), and '*Reason' (ADV). A callout points to these fields.
- Effective Period:** Includes 'Start Term' (0000) and 'Start Date' (03/08/2017). Callouts explain the requirements for these fields.
- Assignment Details:** Includes '*Department' (CUA), 'Reference', and 'Amount' (0.000).
- Contact Information:** Includes 'Contact ID' and 'Placed Person ID' fields.
- Comments:** A large text area for optional notes.

At the top right, there are buttons for 'Run', 'Process Monitor', and 'Manager'. A 'Run' button is highlighted with a callout.



Process Scheduler Request

User ID: **WOODS** Run Control ID: **MASS_ASSIGN_SI**

Server Name: Run Date:
 Recurrence: Run Time:
 Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" 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

7. Click the [Publish Assign Service Ind](#) select box.

8. Click OK.

Note: Navigate to your process monitor check the status of the job.



CARDINAL STATION SERVICE INDICATOR MASS ASSIGN INSTRUCTIONS

MASS ASSIGN VIA AN EXTERNAL FILE

See prior section for instructions for assigning from a Cardinal Station query.

Navigation: Campus Community > Service Indicators (Student) > Mass Assign

Note: The first time you run the process you will need to add a new run control.

Mass Assign

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

Population Selection

Selection Tool: External File Upload File Delete File

Attached File: grads300.csv

File Mapping: SERVICE INDICATOR Edit File Mapping

Service Indicator Data

*Institution: The Catholic Univ of America

*Service Indicator Code: ES Enrollment Services

*Reason: ESG Certified Funds Required Use S

Effective Period

Start Term: 1161 Spring 2016

Start Date: 04/25/2016 End Date:

Assignment Details

*Department: ENRL_SVCS Enrollment Services

Reference:

Amount: 0.000 Currenc

Contact Information

Contact ID: Contact Person:

Placed Person ID: 2358812 By:

Comments

7. Click Run.

1. Select External File from the drop down menu.

2. Select Upload File and select your Excel file. The file must be saved as a .csv file and the student ID must be in the 1st column.

3. Enter SERVICE INDICATOR as the mapping type.

4. Select The Catholic University of America as the Institution. Type the Service Indicator Code and Reason. Contact Enrollment Services if you need a new service indicator created.


5. You must enter a start term and start date. End term and end date are optional. Use them only if you want the hold to automatically stop being effective for a term or date.

6. Assignment Details, Contact Information, and Comments are all optional. You may enter data here but it is not required.



Process Scheduler Request

User ID: WOODS Run Control ID: MASS_ASSIGN_SI

Server Name: Run Date: 
Recurrence: Run Time:
Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" 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

9. Click OK.

8. Click the [Publish Assign Service Ind](#) select box.

Note: Navigate to your process monitor check the status of the job.