

# SERVICE INDICATOR LOAD PROCESS

## OBJECTIVE:

Explain how to put a Service Indicator (Hold) on multiple students at one time.

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### ***NEED ADDITIONAL INFORMATION?***

For further questions on this process please go to the CMS webpage at <http://www.sonoma.edu/cms/contact.shtml> to locate the **Student Records Functional Lead** under Student Administration.

## **STUDENT RECORDS**

STAFF - [http://www.sonoma.edu/cms/documentation/Service\\_Indicator\\_Load\\_Process](http://www.sonoma.edu/cms/documentation/Service_Indicator_Load_Process)

Last Update: 6/27/07

# Lesson 1: Preparing Your File to Load

**Navigation:** Home>Reporting Tools>Query>Query Manager

## Introduction

Service Indicators (Holds) can be placed for students who are not yet in compliance with university regulations (i.e., WEPT, department advising, disqualification, etc.). This lesson will take you through the steps needed to put a hold on multiple students at one time<sup>1</sup>.

The first step to this process is to create a spreadsheet which will be used in the load process. You can use a file that was; 1) created through a PeopleSoft Query; or 2) created manually. Regardless of the spreadsheet you use, it will need to be formatted into a .csv file before uploading for this process to work.

## Downloading a Query File

Item	Action
1.	Navigate to Query Manager (Fig. 1)
2.	Select your query.
3.	Click Excel in the "Run to Excel" column. (Fig. 2) <i>Note - if you have Pop-Up Blocker enable, hold the control key.</i>

Figure 1 – Query Manager

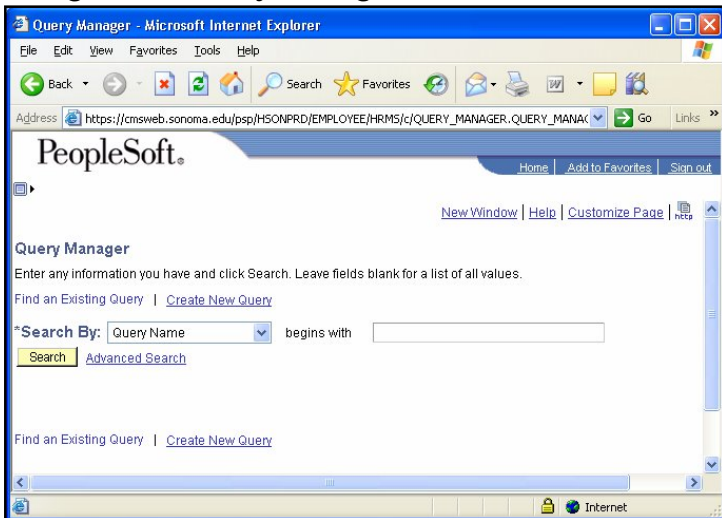
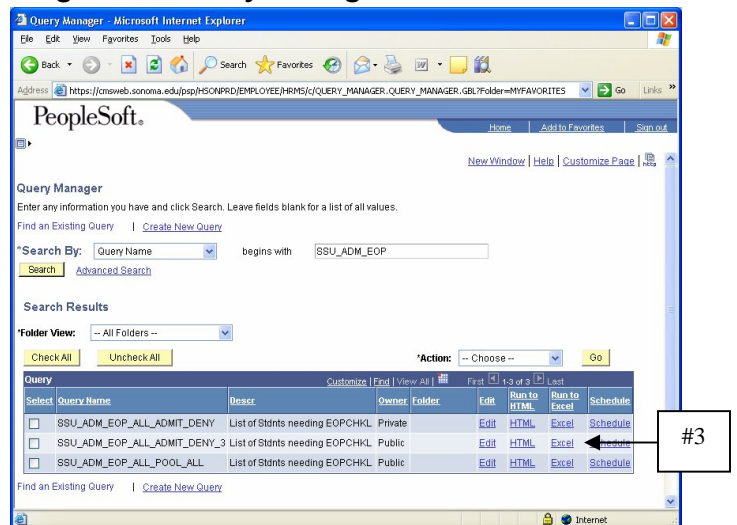


Figure 2 – Query Manager Search Results

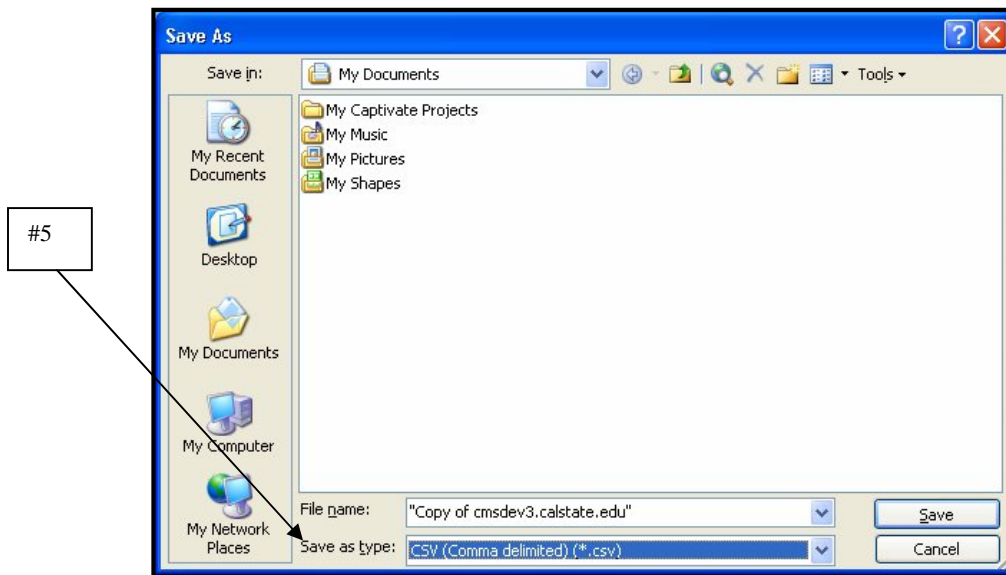


<sup>1</sup> If you only have a few students who require a hold you can refer to [Placing and Lifting Service Indicators \(Holds\)](http://www.sonoma.edu/cms/documentation/Placing_and_Lifting_Service_Indicators) documentation at [http://www.sonoma.edu/cms/documentation/Placing\\_and\\_Lifting\\_Service\\_Indicators](http://www.sonoma.edu/cms/documentation/Placing_and_Lifting_Service_Indicators)

## STUDENT RECORDS

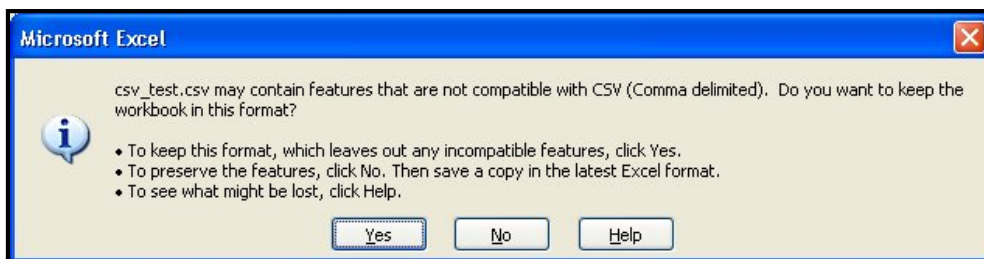
4.	Delete row 1 which indicates the number of students on the report.
5.	Select "File" on the menu bar, the "Save as". Select the folder you wish to save the file to. Name your file as .csv file under "Save as type". Click "Save" (See FYI) (Fig. 3)
6.	A message will pop-up asking if you want to save the file (Fig. 4). Select "Yes. When exiting you will again be asked if you wish to save the file. Select "yes".

**Figure 3 – Saving Your File**



**Note:** When naming your file make sure there are no spaces between the words. Separate words with an underscore e.g. STDNTS\_DISQED\_2073

**Figure 4 – Save Message**



## Lesson 2: Loading your file

**Navigation:** Home > SON Customizations > SON Campus Solutions > Student Records > Process > Service Indicator Load

Item	Action
1.	<p>The first time you run the Service Indicator Load process, you will have to create a Run Control. You will use this same Run Control every time you wish to run this process again.</p> <ol style="list-style-type: none"> <li>For the first time only, click “Add a New Value” in the Service Indicator Load page (Fig. 5).</li> <li>Type the name you wish to call the Run Control. A suggested name is Service_Ind_Load (<i>no spaces are allowed in the name of a Run Control</i>). (Fig. 6)</li> <li>Click the yellow “Add” button. (Fig 6)</li> <li>Subsequent times you run this process, simply enter the name of the Run Control and click “Search” or just click “Search” to select the Run Control from a list. (Fig. 5)</li> </ol>

Figure 5 – Service Indicator Load

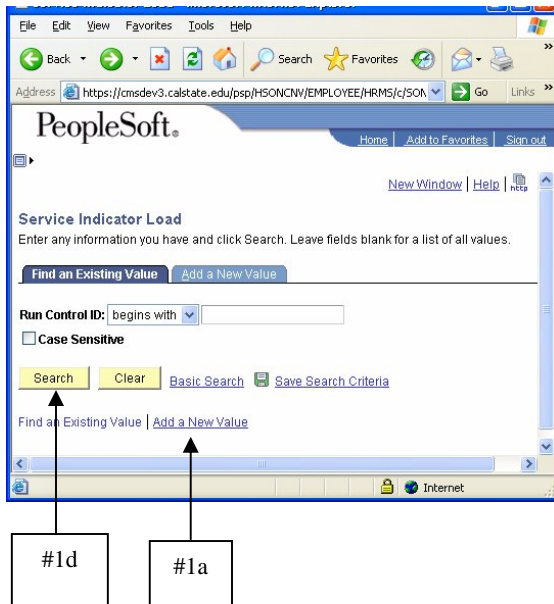
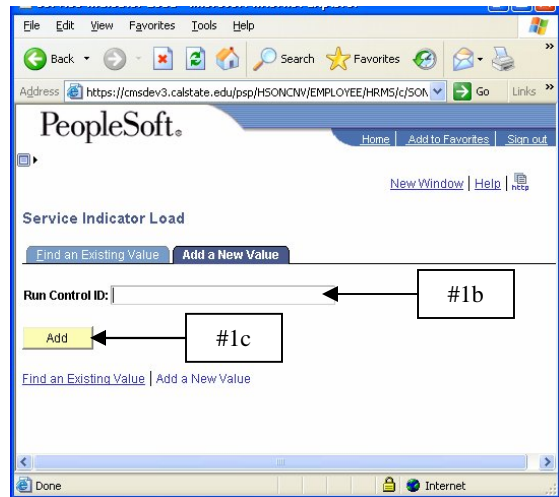



Figure 6 – Add a New Value



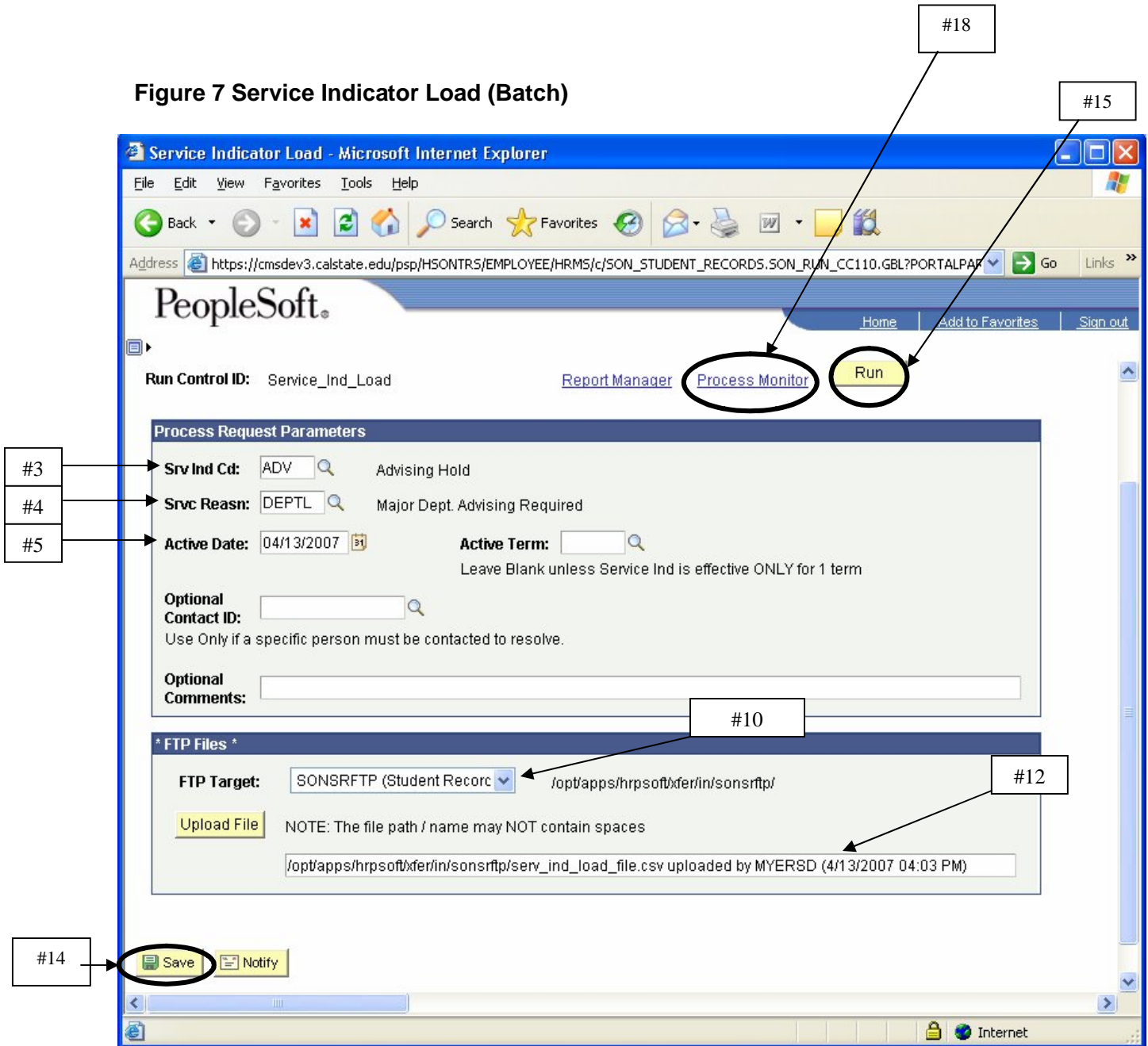
**NOTE:** If at anytime you see this magnifying glass icon  click on it to view codes to enter.

2.	The <b>Service Indicator Load (Batch)</b> page will be displayed.
3.	In " <b>Srv Ind Cd</b> " to select the service indicator you want to load. If you cannot find the service indicator you are looking for in this list, please contact your Functional Lead. You may be a row level security issue which your lead can fix for you.
4.	In " <b>Srv Reason</b> " select the appropriate service indicator reason code to load.
5.	The " <b>Active Date</b> " will default to today's date. You may change this to a future date if you want a service indicator to be activated in the future (e.g. first day of the semester).
6.	Leave the " <b>Active Term</b> " blank unless you want the service indicator to be effective for one term only.
7.	The " <b>Contact ID</b> " field is optional. Only enter an Empl_ID in this field if you want to direct students to a particular individual. <b>Be aware that students WILL see this person's name and email address through student self service.</b>
8.	The " <b>Comments</b> " field is optional. Enter comments to further describe or identify the reason for this service indicator, etc. <b>Be aware that student WILL NOT be able to see the information contained in this field.</b>
9.	Select the FTP Target named SONSFTP.
10.	Click the yellow "Upload File" button to select the file you want to load (your .csv file). A new window will appear on your screen.

See Figure 7 on page 6  
for screen shot of  
numbers  
2-12,  
and  
14, 15 & 18



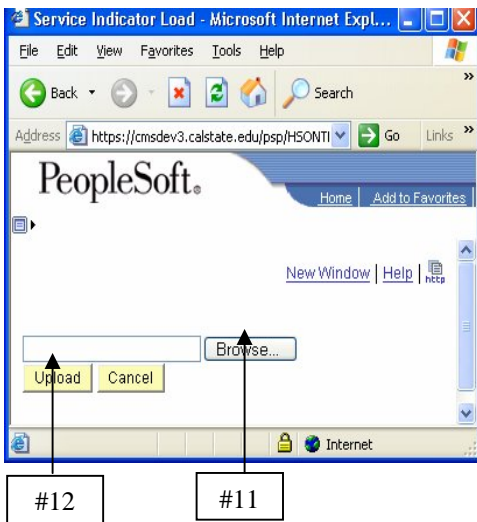
Figure 7 Service Indicator Load (Batch)



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11.	Click "Browse" and find the .csv file downloaded in Lesson 1. Click "Open". (Fig. 8)
12.	Once selected, click "Upload". (Fig. 8)
13.	The system will take you back to the previous screen and you will see the file name and path has defaulted in the File Path/Name field. (See screenshot on page 6)

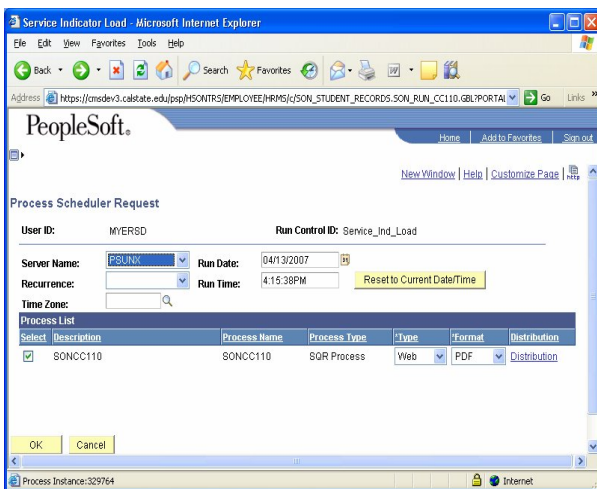
**Figure 8 - File Upload**



14.	Click "Save". You are now ready to run the process.
15.	Click the "Run" button.
16.	Be sure the: <ul style="list-style-type: none"> <li>a) Server Name is PSUNX</li> <li>b) "Select" box is checked next to the SONCC110 description</li> <li>c) Type field is set to Web and</li> <li>d) Format field is set to PDF</li> </ul> (See Fig. 9)
17.	Click "OK" and the system will process your job request and take you back to the Service Indicator Load (Batch) page. (Fig. 9)
18.	On Service Indicator Load (Batch) page, you will see an instance or job number has appeared below the Process Monitor link. Click on the Process Monitor link to monitor the progress of your process.

## Checking for Errors

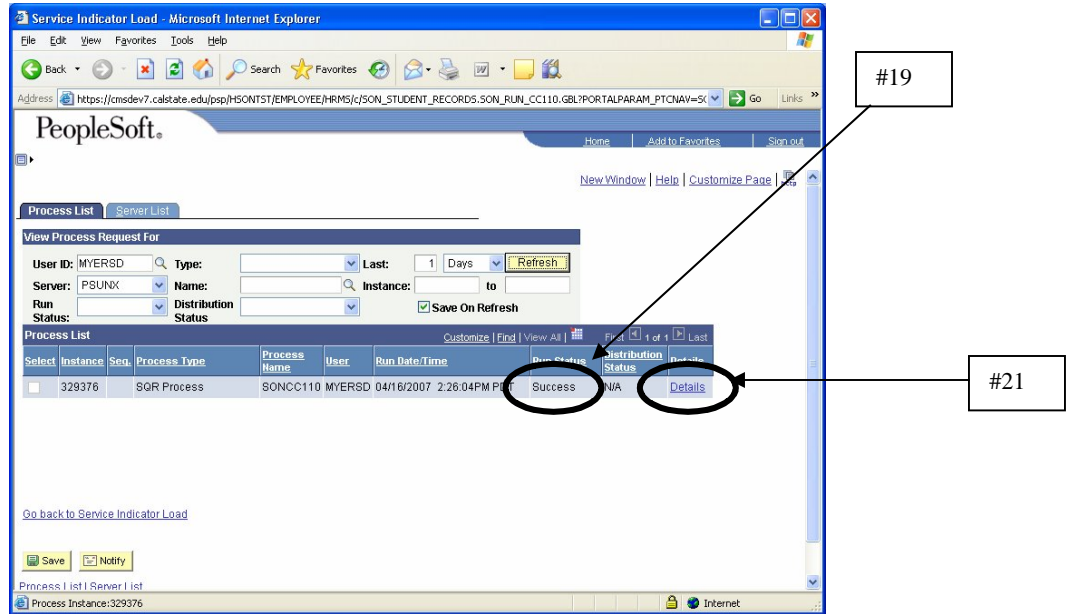
**Figure 9 – Process Scheduler Request**



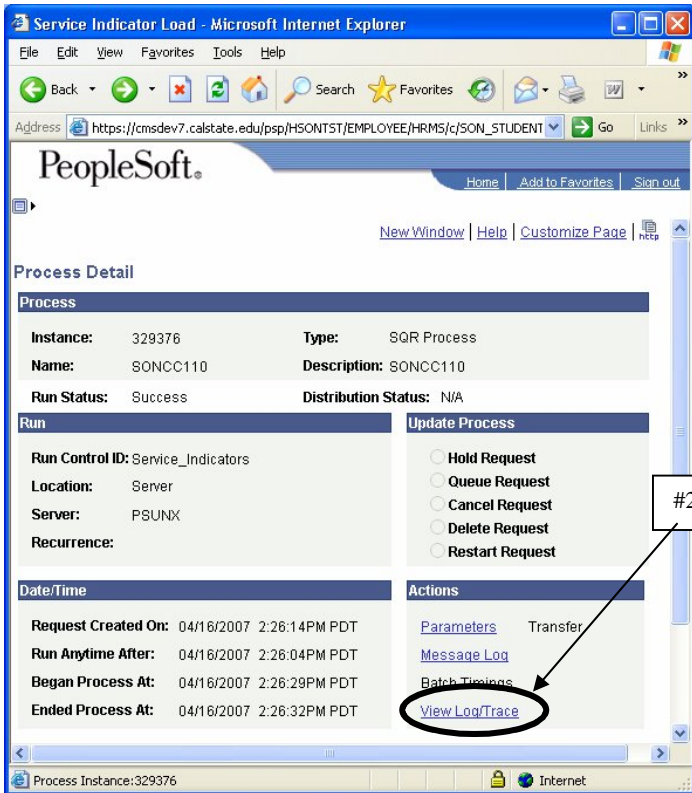
19.	In the View Process Requests Page, click the yellow Refresh button until the word "Success" appears under Run Status (Fig. 10)
20.	The process is complete but you need to check what was loaded and to see if there were any errors.
21.	Click on the details link. It will take you to the Process Details page. (Fig. 10)
22.	Click on the View Log/Trace. It will take you to the Report/Log Viewer page. (Fig. 11)
23.	Click on the Trace File link. The trace file will appear. (Fig. 12)

## STUDENT RECORDS

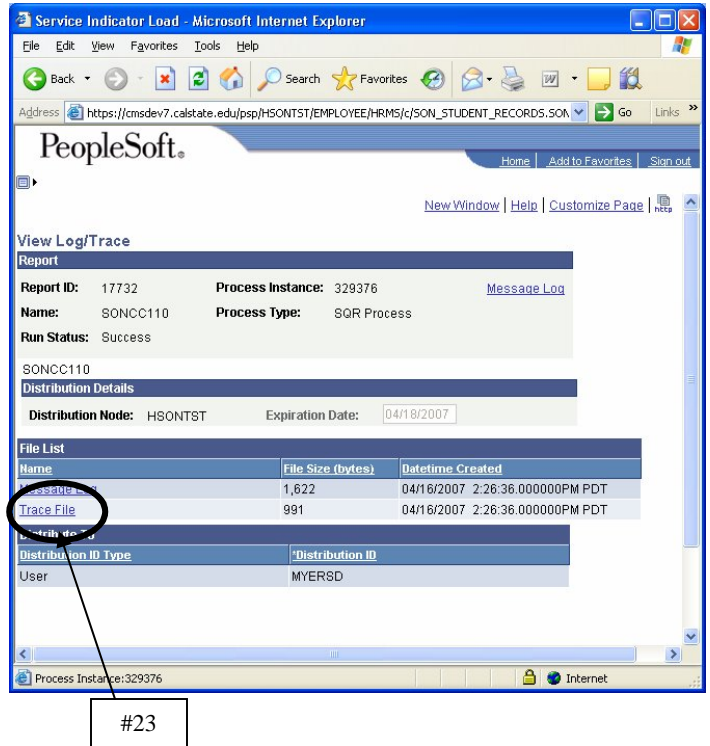
**Figure 10 – Process Request**



**Figure 11 - Trace File**



**Figure 12 – Report/Log View**



## STUDENT RECORDS

STAFF - [http://www.sonoma.edu/cms/documentation/Service\\_Indicator\\_Load\\_Process](http://www.sonoma.edu/cms/documentation/Service_Indicator_Load_Process)  
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**Figure 13 - Trace File Log**

```

Begin-program
Init-Process

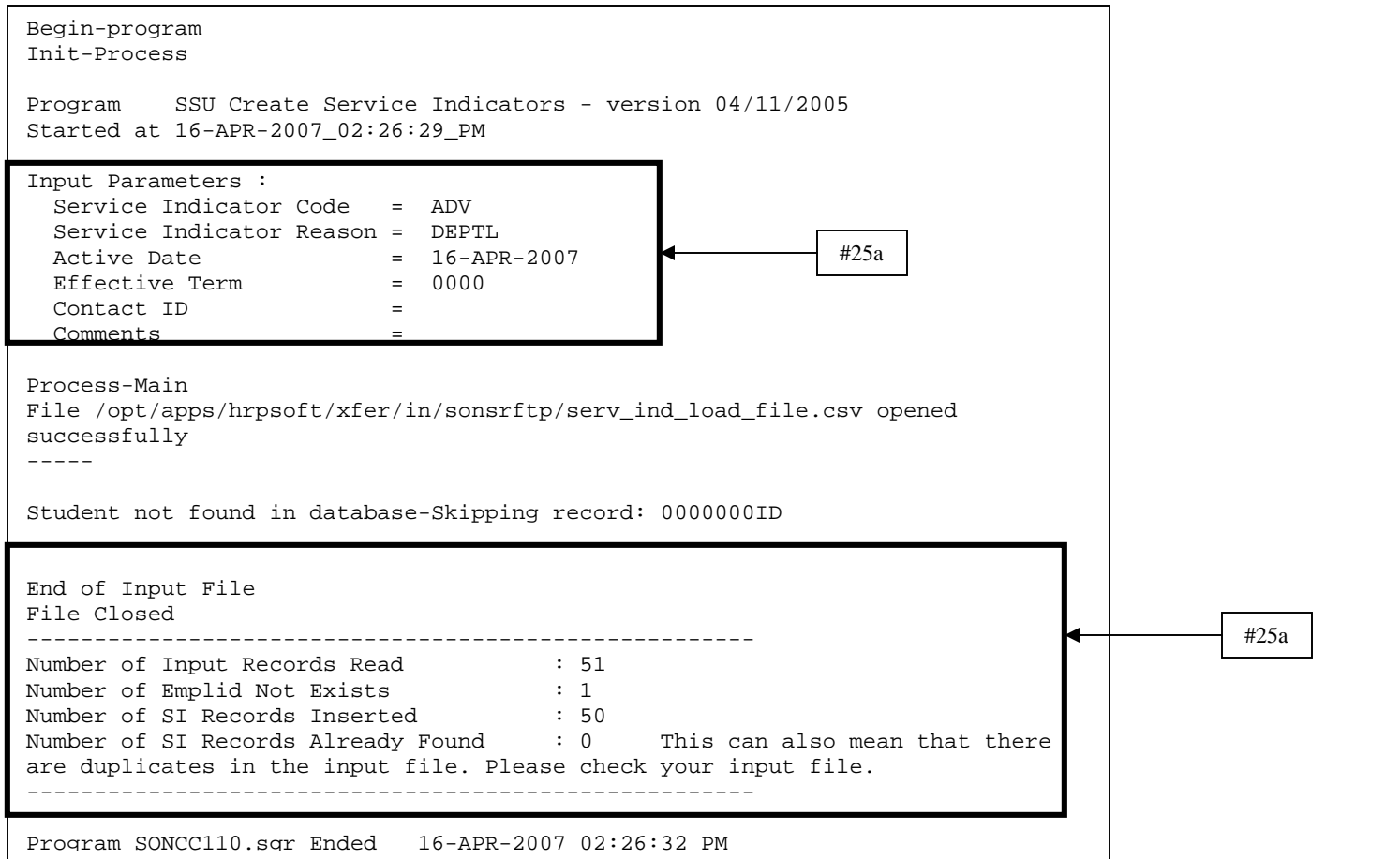
Program    SSU Create Service Indicators - version 04/11/2005
Started at 16-APR-2007_02:26:29_PM

Input Parameters :
Service Indicator Code   = ADV
Service Indicator Reason = DEPTL
Active Date              = 16-APR-2007
Effective Term           = 0000
Contact ID               =
Comments                 =

Process-Main
File /opt/apps/hrpsoft/xfer/in/sonsrftp/serv_ind_load_file.csv opened
successfully
-----
Student not found in database-Skipping record: 0000000ID

End of Input File
File Closed
-----
Number of Input Records Read      : 51
Number of Emplid Not Exists      : 1
Number of SI Records Inserted    : 50
Number of SI Records Already Found : 0   This can also mean that there
are duplicates in the input file. Please check your input file.
-----

Program SONCC110.sqr Ended    16-APR-2007 02:26:32 PM
  
```



<p>24.</p>	<p>There are two items to check in the trace file</p> <ul style="list-style-type: none"> <li>a) Ensure that your input parameters are what you entered on the run control page. (Fig. 13)</li> <li>b) Scroll to the bottom of the page and check that the number of records inserted matches the number of records in your original query. If this number does not match, please review the trace file for error messages and resolve if necessary. (Fig. 13)</li> </ul> <p>The most likely error message you will receive is that a service indicator has already been found for particular Empl_Ids. This is because a service indicator record for the parameters you specified already exists for the student(s) listed or because there were duplicates in your load file. Check both scenarios to get your answer. Either way, no further action is required.</p>
<p>25.</p>	<p>Close the trace file window and you will be on the View Log/Trace page (Fig. 13). Click "Return, then "OK" get to the Process Monitor Request list. Your load is complete.</p>