

Batch Processing Service Indicators

Purpose: Use this document as a reference for processing service indicators for a batch of students in ctcLink.

Audience: College Staff responsible for maintaining student information

 You must have at least one of these local college-managed security roles:

- ZD CC Service Indicators
- ZZ CC Service Indicators

You must also set these SACR Security permissions:

- [CS 9.2 SACR Security: Basic Requirements for Staff](#)
- [CS 9.2 SACR Security - Service Indicator Security](#)

If you need assistance with the above security roles or SACR settings, please contact your local college supervisor or IT Admin to request role access

Identifying the selection tool for student populations is the first step in batch-processing service indicators. Batch processing using an External File or PS Query is covered in this QRG. For more information about Equation Engine, please contact a system administrator.

A service indicator's (SI's) impact is specific to each institution. Suppose a student has a Service Indicator blocking enrollment; **it only affects their activity at that institution.**

Mass Assigning Service Indicators

Navigation: Campus Community > Service Indicators > Person > Mass Assign

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

1. The **Mass Assign** search page displays.
2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.

3. **NOTE:** It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_MASS_ASSIGN_SERV_IND (Institution, Process).

Population Selection

5. **Selection Tool:** Activate the drop-down list and choose **PS Query**.
6. **Query Name:** Click on the looking glass to select a query that meets your business needs. Only queries containing the bind record can be specified here.
7. **Edit Prompts:** Select the **Edit Prompts** link (to the right of the Selection Tool field).
8. The **Query Prompts** window displays. The prompts required for different queries will vary.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

View Tutorial Via Panopto

View the external link to [Population Selection \(Query\) - No Audio](#). This link will open in a new tab/window.

External File

- If you run a query to identify students and download results to an Excel file, you can experience issues. Please copy and paste the query results into an Excel file for the best outcome. Save it as a .csv file before using it.
- **File mapping** enables staff to set up a field-to-field mapping to load data from a Microsoft Excel file in .csv format.

1. Format your Microsoft Excel file in .csv format.
2. **Selection Tool:** Activate the drop-down list and choose **External File**.

3. **Upload File:** Click the button and upload your saved Microsoft Excel file in .csv format. It may be necessary to reformat your .csv file if the required fields are not included in it.
4. To view existing **File Mappings**, select the File Mapping looking glass. If a file mapping meets your needs, there is no need to create a new one. However, if you need to create a new file mapping, you can do so by following the instructions in the Quick Reference Guide (QRG) [Create File Mapping](#).
5. Select **Preview Selection Results** to review the formatting of the upload file, ensuring no blank rows exist.
6. Select **Return** after viewing results.



Note: If the external file selection tool process exceeds the maximum number of results (rows--e.g., 10,000) to return, the process will not process ANY of the IDs.

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View Tutorial Via Panopto

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Service Indicator Data

1. Select your **Academic Institution** from the drop-down list. Users can only select an institution if they have SACR Security for that institution.
2. **Service Indicator Code:** Click the looking glass and choose a **Service Indicator Code**. Users can only select a Service Indicator Code if they have SACR Security for that institution.
3. **Reason:** To select a Reason, click the looking glass.
4. If the Service Indicator is term-based, select the appropriate term from the **Start Term** and **End Term list**.
5. The Start and End Date fields may be used with the Start and End Term fields to specify a date range within a term. If the service indicator is date-based, enter the **Start Date** and **End Date** if the service indicator should expire on a specific date. If the service indicator is indefinite, leave the End Date field blank.

6. Enter a code for the **Department** placing the service indicators or use the magnifying glass icon to select a Department from the list. This may auto-fill dependent on the UserID of the individual running this process. The
7. Enter contact information and comments if required by the local business process.
8. Select **Run**. Refer to the [Process Scheduling](#) QRG for instructions.
9. The **Process Scheduler Request** page displays.
10. Select the **SCC_SI_ASSN** checkbox.
11. Select the format to view the report.
12. Select **OK**.
13. The **Mass Assign** page displays. Select the **Process Monitor** link.
14. The **Process Scheduler Request** page displays.
15. Select the **SCC_SI_ASSN** checkbox.
16. Select the format to view the report.
17. Select **OK**.
18. The **Mass Assign** page displays. Select the **Process Monitor** link.
19. At the **Process List** page, ensure the **Run Status** runs to **Success** and the **Distribution Status** runs to **Posted**. You may select the **Refresh** button until the status is **Success**, **Posted**. The student record will now show an icon in the Student Services Center and other student pages in ctcLink, indicating the active service indicator.

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Video Tutorial Via Panopto

View the external link to [Service Indicator Data - No Audio](#). This link will open in a new tab/window.

Mass Releasing Service Indicators

Navigation: NavBar > Navigator > Campus Community > Service Indicators (Student) > Mass Release

Navigation: NavBar > Navigator > Campus Community > Service Indicators > Person > Mass Release

1. The **Mass Release** search page displays.

2. If you have run this process or report in the past, select the **Find an Existing Value** tab to enter an existing Run Control ID and select the **Search** button. If this is the first time running this process or report, select the **Add a New Value** tab to create a new Run Control ID and select the **Add** button.
3. **NOTE:** It is important to note that [Run Control IDs](#) cannot be deleted. Do not include spaces in your Run Control. We encourage the Run Control ID to have the same process naming convention but unique to the step; because of this, including your institution code and a short process description in the Run Control ID is recommended--e.g., WA220_MASS_RELEASE_SERV_IND (Institution, Process).
5. The **Mass Release** page displays.
6. Select "[PS Query](#)" or "[External File](#)" from the **Selection Tool** drop-down menu. (Please refer to the [PS Query and External File](#) steps above.)
7. Select **Institution**.
8. Select **Service Indicator Code**.
9. Select **Reason**.
10. Select **Run**. Refer to the [Process Scheduling](#) QRG for instructions.
11. The **Process Scheduler Request** page displays.
12. Select **SCC_SI_RELS**.
13. Select **OK**.
14. The **Mass Assign** page displays. Select the **Process Monitor** link.
15. At the **Process List** page, ensure the **Run Status** runs to **Success** and the **Distribution Status** runs to **Posted**. You may select the **Refresh** button until the status is **Success, Posted**.
16. Process complete.

Video Tutorial

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