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

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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.

Cori	rect:		Inco		
	А	В		А	В
1	9999999	Mickey Mouse	1	Id Number	Name
2	1392008	Homer Simpson	2		Mickey Mouse
3	1440987	Sammy Slug	3	W1392008	Homer Simpson
4	0123456	Fred Flintstone	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.

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			Windows Formatted Text (.txt)				
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	Online Locations	s File Format	MS_DOS_Comma Separated (.csv)				
			Space Delimited Text ( prp)				
			Data Interchange Format ( dif)				
			Sumbolic Link ( elk)				
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### 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:

- 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	Choose the Add a New Value tab.
Search Criteria	
Run Control ID: begins with ▼ mass_release_COL Case Sensitive Limit the number of results to (up to 1000): 300	Enter the name - or - part of the name - of your run control.
Search Clear Basic Search 🖾 Save Search Chiena	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.

Mass Release					
Run Control ID: ma	ss_release_COL		Report Manager	Process Monitor	Run
Population Selection	n				
Selection Tool:	External File	۳			
Attached File:	release_clg_holds_15may17.csv		Upload File	Delete File	View File
File Mapping:	COLLEGE_RELEASE	Q		Preview	w Selection Results

FIELD NAME	The Value You Click or Enter
Selection Tool:	External File
Attached File:	<ol> <li>Click Upload File.</li> <li>Click Choose File. Browse to and select your .csv file.</li> <li>Click Upload.</li> </ol>
	File Attachment       Help         Choose File release_cl5may17.csv       Upload Cancel         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.
	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 C	ruz 🔻	
*Service Indicator Code	COL	College Enrollment Hold	
*Reason	CAADV Q	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 hold you are releasing:CAADVAcademic AdvisingCACMPC1/C2 Enrollment HoldCAMINMinimum ProgressCAPRGAcademic ProgressCAREAReadmission HoldCAUNDUndeclared MajorCAWRTWriting Enrollment Hold

Effective Period		
Start Term		End Term Q
Start Date	<b>BI</b>	End Date

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 <b>four-digit term code</b> 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_relea	ase_COL	Report Manager	Process Monitor	Run	
Population Selection					
Selection Tool:	External File	Ŧ			
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.

User ID	1343693	Run Control ID mass_release_COL							
Server Name		Ŧ	Run Dat	e 05/31/2017	<b>BI</b>				
Recurrence		Ŧ	Run Time 12:57:16PM		R	eset	to Curren	irrent Date/Time	
Time Zone	Q								
Process List									
Select Description		Process Na	me	Process Type	*Type		*Format		Distribution
SCC_SI_RE	LS	SCC_SI_R	ELS	Application Engine	Web	*	TXT	T	Distribution
OK Car	ncel								

3. AlS 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 Pro	cess Monitor Run	]
	Proces	s 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.)

Proces	ss List	<u>S</u> erve	er List								
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Run Status 🔹 Distribution Status 🔹 🐨 Save On Refresh											
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Select	Instance	Seq.	Process Ty	pe	Process Name	User	Run Date/Time		Run Status	Distribution Status	Details
	1400634		Application	Engine	SCC_SI_RELS	3 1392008	01/13/2016 3:4	2:47PM PST	Success	Posted	Details

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.