Assigning Student Groups

Concept

Use this procedure to assign individuals to student groups and to determine all the student groups to which an individual has been assigned. Each UMS Institution has its own set of student groups defined for internal use. A student may be assigned to multiple groups at multiple Institutions.

A batch process is available to assign students to groups via an uploaded file.

In this topic, you will see how to assign an individual student to a student group, how to see all the groups the student is in, and how to use the batch process.

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### Assigning Student Groups to an Individual Student

#### Procedure

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<tr>
<td>1.</td>
<td>Navigate: <strong>Student Admissions &gt; Application Entry &gt; Academic Information &gt; Student Groups</strong>&lt;br&gt;or&lt;br&gt;<strong>Student Recruiting &gt; Maintain Prospects &gt; Academic Information &gt; Student Groups</strong>&lt;br&gt;or&lt;br&gt;<strong>Records and Enrollment &gt; Career and Program Information &gt; Student Groups</strong></td>
</tr>
<tr>
<td>2.</td>
<td>On the search page, enter search criteria to identify the student, <em>Institution</em> and <em>Career</em>.</td>
</tr>
<tr>
<td>3.</td>
<td>After entering search criteria, click the <strong>Search</strong> button.</td>
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</table>
Step | Action
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4. | Use the **Student Groups** page to assign one or more Student Groups to the student. Use the **Add a new row** button in the upper right of the page to assign additional groups.

Each Student Group assigned has an **Effective Date** and a **Status** of **Active** or **Inactive**. To inactivate a particular group for this student, add a new Effective Dated row in the lower part of the page, with Status set to **Inactive**.

Enter **Comments** if desired.
5. Click the **Look up Student Group** button to view the list of groups. Your security settings determine which groups you can access.
### Step 6
6. Select the group from the list.

- **HONO** - Honors Applicant

### Step 7
7. By default, the **Effective Date** is set to the current date, but you can override that.

The **Status** is set to **Active** by default. Click the **Status** pull-down menu to see the options.

- **Active**
Step | Action
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8. | To assign another group to the student, add a row by clicking the **Add a New Row** button.
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<td>9.</td>
<td>Depending on your security, in addition to your own Institution, you might be able to assign a group from a different Institution - edit the <strong>Academic Institution</strong> field and then select the new <strong>Student Group</strong>.</td>
</tr>
</tbody>
</table>
### Step 10.
The student shown above has been assigned two student groups. To see all the groups, you can click the **View All** link.

### Step 11.
Click **Save**.
Using the Batch Process to Assign Student Groups

12. You have seen how to assign student groups to students one at a time. You can also assign a student group to a set of students, using a batch process.

On your workstation prepare a file containing a list of student IDs. The file can be a .csv or a .txt file - in other words prepare the file using Excel and save as .csv, or using a word processor or text editor like Notepad and save as .txt. The file should have one ID per line.

Note to Macintosh users: if you save the file as a text file (txt), save it in Windows format. Alternatively use Excel and the .csv format.

Step | Action
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Step | Action
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14. | As with most batch processes, this requires a **Run Control ID**. If you already have a **Run Control ID** to use, click the **Search** button and select it from the list.

If you need to create a new **Run Control ID**, click the **Add a New Value** tab.
15. On the Add a new Value page, type in a name for the new **Run Control ID**. Do not use blanks in the name.

Click the **Add** button.
### Step 16

On the Student Group Load page, enter the **Institution, Student Group** to assign, and date when the assignment will be active in the **Active Date** field. If you also want to inactivate the assignment on a certain date, enter that date in the **Inactive Date** field.

When you manually assign a student group to a single student, the Tuition Calculation Required Flag is set to Y. For this batch process, you can choose whether or not to have the flag set to Y. To set the Tuition Calculation Required flag to Y for the students being processed, select the **Tuition Calc Required** checkbox.

### Step 17

Enter the **Institution**.

### Step 18

Look up the student group. Click the look up button.

### Step 19

Select the student group from the list.

### Step 20

Check **Tuition Calc Required**, if you want to set the Tuition Calculation Required flag for these students.

Enter the **Active Date**. Enter an **Inactive Date** if desired.
Step | Action
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21. | You now need to upload the prepared file of student IDs.

Click the paperclip icon immediately to the right of the **Attached File** field.
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<td>Click the <strong>Browse</strong> button.</td>
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<td>Action</td>
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<tr>
<td>------</td>
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</tr>
<tr>
<td>23.</td>
<td>The Browse button brings up a new window where you can navigate through the files on your workstation and select the file of student IDs. Click the desired file and click the <strong>Open</strong> button.</td>
</tr>
<tr>
<td>Step</td>
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<td>------</td>
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<tr>
<td>24.</td>
<td>Click the <strong>Upload</strong> button.</td>
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</table>
| 25.  | The file of student IDs has been uploaded. Use the **View Attachment** icon ("eye glasses") to view the contents of the uploaded file. Use the "trashcan" icon to delete it in case you uploaded the wrong file.  
Click the **View Attachment** icon. |
| 26.  | **View Attachment** opens a new window displaying the contents of the uploaded file. Close the window in the usual way by clicking the X in the upper right corner. |
27. To run the process, click the Run button.
Step | Action
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28. | Click **OK**
Step | Action
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29. | Click the **Process Monitor** link.

**Process Monitor**
30. If necessary, click the **Refresh** button. Once you see **Run Status Success** and **Distribution Status Posted**, click the **Details** link to view the results report.
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<td>31.</td>
<td>Click <strong>View Log/Trace.</strong></td>
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</table>

[View Log/Trace]
### Step 32
Click **Redirected Terminal Output**.

### Step 33
The Redirected Terminal Output opens in a new window. Each student id is listed, showing the group assignment.

### Step 34
**End of Procedure.**