

SA – Admission Deposit

At times it will be necessary to change the deposit amount or due date for a large group of students. In order to facilitate this process a group change function is available to accelerate this process. The process requires the export of records from PeopleSoft, the removal of non-relevant records, and the import of those records back into PeopleSoft with the desired changes.

**Note:** When a student has paid for their Admission Deposit via online banking it can take three to five days for the payment to be posted to their account. Until then it will show as not paid within the Student Center.

- Click the Reporting Tools link.
   ▶ Reporting Tools
- 2. Click the **Query** link.
- 3. Click the Query Manager link. Query Manager
- 4. Enter **ucad\_admin\_deposit** into the Search by begins with field and press Enter or Search Click the **Search** button.
- 5. The query **UCAD\_ADM\_DEPOSIT\_MASS\_CHANGES** display and is the query required to begin the process. It is recommended to save it as a favorite. Click the **Run to Excel** link.

Exce

nter any information you have and click Sear	rch. Leave fields blank fo	or a list of all val	ues.				
*Search By Query Name V begins with UCAD_ADM_DEPOSIT ×							
Search Advanced Search	h						
Search Results							
Search Results *Folder View - All Folders Query	~	A.	F	Personalize	Find   View All	First 🕥	1 of 1 🕑 Last
Search Results *Folder View - All Folders Query Query Name	Description	Owner	Folder Run HTM	Personalize   1 to Run to ML Excel	Find   View All Run to XML Schedule	Image:	1 of 1 🕑 Last Add to Favorites

6. Enter the institution directly (UCALG) or use the Look up tool. Click the **Look Up** button.



- Click the Look up Career button and click the UGRD link.
- Click the Look up Admit Term From button (e.g. Fall 2015 2157). Click the 2157 link.
   2157
- Click the Look up Admit Term To button (e.g. Fall 2016 2167). Click the 2167 link.
   2167



SA – Admission Deposit

- 10. Click the **Look up Application Center** button and click the **UGRD** link.
- 11. If no other selections are required, press the **View Results** button. **Note:** You can enter all these values manually without using the Look Up tools. Click the **View Results** button.

View	Results	

UCAD_ADM_DEPOSIT_	MASS_CHANGES - Adm Deposit Mass Changes Query
Institution: Career: Admit Term From: Admit Term To:	UCALG Q UGRD Q 2157 Q 2167 Q
Admit Type: Acad Prog:	
Deg Plan: Major/AOS: Other Plan(MIN/SPC/COH/LC	Q Q DC): Q
Srv Ind Cd: View Results	

12. You will be prompted to open an Excel spreadsheet **UCAD\_ADM\_DEPOSIT\_MASS\_CHANGES.xlsx**.... Click the **Open** button.

Open

13. A list of students will display including Admission Deposit ID, Application Number, First Name, etc. For FOIP reasons some information has been removed.

	А	В	С	D	E
1	Adm Depos	1446			
2	ID	Appl Nbr	First Name	Middle	Last
3	00269216	42336268			
4	00269514	42313647			
5	00334147	42318050			
6	00334147	42318050			
7	00501801	42355488			
8	10017133	42335679			
9	10035756	42337431			
10	10036554	42330889			
11	10040494	42327491			
12	10046010	42314920			
13	10052198	42329677			
P	V \$287-	4237	man have been a second	have have been	



SA – Admission Deposit

14. Some formatting must be completed prior to saving the file. Select the students you wish to update and update the spreadsheet by removing the two headings (ID and Appl Nbr) and deleting the columns to the right of the application nbr. The spreadsheet should only contain two columns; the ID and Appl Nbr.

	A	В	С	D	E	
1	00269216	42336268				
2	00269514	42313647				
3	00334147	42318050				
4	00334147	42318050				
5	00501801	42355488				
6	10017133	42335679				
7	10035756	42337431				
8	10036554	42330889				
9	10040494	42327491				
10	10046010	42314920				
11	10052198	42329677				
12	10053287	42323085				
13	10053555	42328479				
14	10056099	42333462				
15	10058648	42328969				
16	10077144	42330047				
17	10080279	42334390				
18	10080885	42308893				

15. Save the file as a **.CSV (Comma Delimited file)** (e.g. File > Save As). Click the **Save** button.

#### Import Records Back to PeopleSoft

The next steps are how to import the records back into PeopleSoft with the desired changes.

1. Click the **Student Admissions** link.

Student Admissions

- 2. Click the Processing Applications link. Processing Applications
- 3. Click the Update Applications link.
- 4. Click the **Bulk Update Adm Deposit Record** link. Bulk Update Adm Deposit Record
- 5. Use an existing run control value (Search) or create a new one by clicking on the Add a New Value tab. Click the **Add a New Value** tab.

Add a New Value



SA – Admission Deposit

Add

Enter the desired run control (e.g. test). Run controls must be one word with no spaces. However, if you wish to use more than one word use underscores to join the words (e.g. long\_run\_control). Click the Add button.

Bulk Update Adm Deposit	
Find an Existing Value Add a New Value	
Run Control ID test	×
Add	

 From Bulk Update of Admission Deposit Records complete the Selection Tool list. Click the Selection Tool list.

 $\checkmark$ 

8. Select External File to enable browsing for the .csv file saved earlier. Click the External File list item.

External File	

- 9. After selecting External file you can select **the Upload File button** and browse for the excel spreadsheet .csv file saved previously. Click the **Upload File** button.
   Upload File
- 10. Browse for the file and click Upload. Click the **Upload** button.
- 11. Click the **Upload File** button.
- 12. After browsing/locating the .csv file click the Upload button. Click the **Upload** button. Upload



Run

# Group Change Deposit Amount and Due Date

SA – Admission Deposit

13. Make the applicable Deposit Action selection (e.g. Change Due Date, Change Due Amount) for this example we will use Exempt Deposit. Click the **Run** button.

Run Cor	ntrol ID: test	Re	port Manager	Process Monitor	Run
Population Selection					78
Population Selection					
Selection Tool:	External File	$\checkmark$	_		
Attached File:	UCAD_ADM_DEPOSIT_MASS_(	CHANGES.csv	Upload File	Delete File	View File
File Mapping:	DEPOSIT	٩	Edit File Mapping	Previe	w Selection Results
Required Criteria					
*Institution: UC	ALG Q				
Deposit Action					
O Change Due Date	New Due Date:				
Change Due Amo	unt New Due Amt:				
Exempt Deposit					

- 14. On the Process Scheduler Request page, click the **OK** button.
  - OK
- 15. Process Instance: number indicates the process has been queued to the processor. Click the **Process Monitor** link.

Process Monitor

16. The Process List will display any processes queued, processing and success. Clicking refresh enables to you view the progress of the run control. Click the **Refresh** button.

Refresh



SA – Admission Deposit

17. Once the process is Success > Posted the details link is available. Click the **Details** link.

View	Process I	Seau	est For						
l	Iser ID		Q     Type       ✓     Name		Last Ins		Days 🗸	Refrest	1
Kun	status		Distributi	ion Status		Save On Refresh			
Proc	ess List					Personalize   Find   View /	All   🔄   📑 Fi	irst 🕚 1-2 of 2	2 🕑 Las
Proc	ess List	Seq.	Process Type	Process Name	User	View / Personalize   Find   View / Run Date/Time	All   코   🔜 Fi Run Status	irst ① 1-2 of 2 Distribution Status	2 Details
Proc Select	ess List Instance 9161468	Seq.	Process Type Application Engine	Process Name UCADB044	User	View / Personalize   Find   View / Run Date/Time 2017/07/06 11:58:42AM MDT	All   🔄   📑 Fi Run Status Success	rst ① 1-2 of 2 Distribution Status Posted	2 (E) Las Details Details

18. Click the **View Log/Trace** link.

View Log/Trace

19. Two files will be listed on the File List: **Process Updates** and **Process Errors**. Click the **UCADB044\_ProcessUpdates.csv** link.

	Descend Indeter
	Processi indates csv
00/10044	110000000000000000000000000000000000000

Report							
Report ID	5095508	Process	Instance	9161468		Message Log	
Name	UCADB044	Proc	cess Type	Application	on Engine		
Run Status	Success						
UCADB044							
UCADB044							
Distributio	n Details						
Distribution	n Details	19	Expiration	Date	2017/08/20		
Distribution	n Details Node PSREPORT	rs	Expiration	Date	2017/08/20		
Distributio Distribution File List	n Details Node PSREPORT	ſS	Expiration	Date	2017/08/20		
Distributio Distribution File List Name	n Details Node PSREPORT	ſS	Expiration File Size (I	Date bytes)	2017/08/20 Datetime Cre	ated	
Distribution Distribution File List Name AE_UCADB0	n Details Node PSREPORT 44_9161468.stdout	rs	Expiration File Size (I 714	Date bytes)	2017/08/20 Datetime Cre 2017/07/06	ated 11:59:16.062278AM MDT	
Distribution Distribution File List Name AE_UCADB0 UCADB044_	n Details Node PSREPORT 44_9161468.stdout ProcessErrors.csv	rs	Expiration File Size (1 714 148,053	Date	2017/08/20 Datetime Cre 2017/07/06 2017/07/06	ated 11:59:16.062278AM MDT 11:59:16.062278AM MDT	
Distribution Distribution File List Name AE_UCADB0 UCADB044_ UCADB044_	n Details Node PSREPORT 44_9161468.stdout ProcessErrors.csv ProcessUpdates.csv	rs	Expiration File Size (I 714 148,053 74	Date bytes)	2017/08/20 Datetime Cre 2017/07/06 2017/07/06	ated 11:59:16.062278AM MDT 11:59:16.062278AM MDT 11:59:16.062278AM MDT	
Distribution Distribution File List Name AE_UCADB0 UCADB044_ UCADB044_ Distribute 1	n Details Node PSREPORT 44_9161468.stdout ProcessErrors.csv ProcessUpdates.csv Fo	rs	Expiration File Size (1 714 148,053 74	Date oytes)	2017/08/20 Datetime Cree 2017/07/06 2017/07/06	ated 11:59:16.062278AM MDT 11:59:16.062278AM MDT 11:59:16.062278AM MDT	
Distribution Distribution File List Name AE_UCADB0 UCADB044_ UCADB044_ Distribute 1 Distribution II	n Details Node PSREPORT 44_9161468.stdout ProcessErrors.csv ProcessUpdates.csv To Stype	rs	File Size (1 714 148,053 74	Date oytes)	2017/08/20 Datetime Cre 2017/07/06 2017/07/06 2017/07/06	ated 11:59:16.062278AM MDT 11:59:16.062278AM MDT 11:59:16.062278AM MDT	



SA – Admission Deposit

20. You will be prompted to open the .csv file. Click the **Open** button.



21. The spreadsheet contains the results of the group admission deposit request for Exempt Deposit.

	Α	В	С	D	E	F	G
1	Emplid	Application Nbr	Deposit Action	Due Date	Due Amt	Waived Amt	Message
2	201816	42373870	Exempt Deposit	6/9/2017	0	0	Update done
3	206544	42374877	Exempt Deposit	6/18/2017	0	0	Update done
4	210182	42375456	Exempt Deposit	6/25/2017	0	0	Update done
5	215248	42372210	Exempt Deposit	6/16/2017	0	0	Update done
6	217409	42370661	Exempt Deposit	6/18/2017	0	0	Update done
7	221204	42371904	Exempt Deposit	6/18/2017	0	0	Update done
8	233249	42354697	Exempt Deposit	6/17/2017	0	0	Update done
9	237260	42346178	Exempt Deposit	6/16/2017	0	0	Update done
10	242406	42356507	Exempt Deposit	5/15/2017	0	0	Update done
11	248671	42375842	Exempt Deposit	6/23/2017	0	0	Update done
12	263418	42376116	Exempt Deposit	5/17/2017	0	0	Update done
13	269514	42313647	Exempt Deposit	9/9/2016	0	0	Update done
14	274563	42376574	Exempt Deposit	5/12/2017	0	0	Update done
15	283846	42372493	Exempt Deposit	5/1/2017	0	0	Update done
16	288888	42375743	Exempt Deposit	6/18/2017	0	0	Update done
17	293902	42375303	Exempt Deposit	5/10/2017	0	0	Update done
18	300909	42364583	Exempt Deposit	6/16/2017	0	0	Update done
19	302076	42376007	Exempt Deposit	5/3/2017	0	0	Update done
20	303822	42364536	Exempt Deposit	5/1/2017	0	0	Update done
21	308262	42374186	Exempt Deposit	6/23/2017	0	0	Update done
	<	ProcessUpdat	tesdone (+	)			



SA – Admission Deposit

# 22. Return to the View Log/Trace and view the Process Errors.csv file. Click the UCADB044 ProcessErrors.csv link.

UCADB044 ProcessErrors.csv

ile List								
Name	File Size (bytes)	Datetime Created						
AE_UCADB044_9161467.stdout	715	2017/07/06 11:34:36.589880AM MDT						
UCADB044_ProcessErrors.csv	8,403	2017/07/06 11:34:36.589880AM MDT						
UCADB044_ProcessUpdates.csv	309,944	2017/07/06 11:34:36.589880AM MDT						

#### 23. Click the **Open** button.



24. This file displays the Process Errors generated from the report. Also included is the Due Amt, Received Amt and the message from the system (e.g. Student's admission deposit is already paid or waived).

	А	В	с	D	E	F	G	н	I	J	К	L
1	Emplid	Application Nbr	Deposit Action	Outstanding Amt	Due Amt	New Due Amt	Received Amt	Message				
2	00269216	42336268	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
3	10056099	42333462	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
4	10085779	42373912	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
5	10136641	42363909	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
6	10172829	42330431	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
7	30003197	42374099	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
8	30008720	42330724	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
9	30009971	42323872	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
10	30016643	42308883	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
11	30016811	42309236	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
12	30017059	42374070	Exempt Deposit	125	500	0	375	Cannot ex	empt as st	tudent ha	s already	paid an amoun
13	30018530	42312196	Exempt Deposit	0	0	0	0	Student's	admission	deposit i	s already	paid or waived
14	30020288	42314813	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
15	30020353	42314933	Exempt Deposit	0	0	0	0	Student's	admission	deposit i	s already	paid or waived
16	30021011	42315879	Exempt Deposit	0	0	0	0	Student's	admission	deposit i	s already	paid or waived
17	30021852	42317122	Exempt Deposit	0	0	0	0	Student's	admission	deposit i	s already	paid or waived
18	30021853	42317123	Exempt Deposit	0	0	0	0	Student's	admission	deposit i	s already	paid or waived
19	30021903	42317187	Exempt Deposit	0	0	0	0	Student's	admission	deposit i	s already	paid or waived
20	30022057	42317447	Exempt Deposit	0	0	0	0	Student's	admission	deposit i	s already	paid or waived
21	30022355	42317997	Exempt Deposit	0	500	0	500	Student's	admission	deposit i	s already	paid or waived
22	30022901	42318813	Exempt Deposit	0	0	0	0	Student's	admission	deposit i	s already	paid or waived
23	30023147	42347416	Exempt Deposit	0	0	0	0	Student's	admission	deposit i	s already	paid or waived

For the corresponding online learning, consult the Student and Enrolment Services, Student Administration (PeopleSoft Campus Solutions) training website. **End of Procedure.**