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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.

1. Click the **Reporting Tools** link.

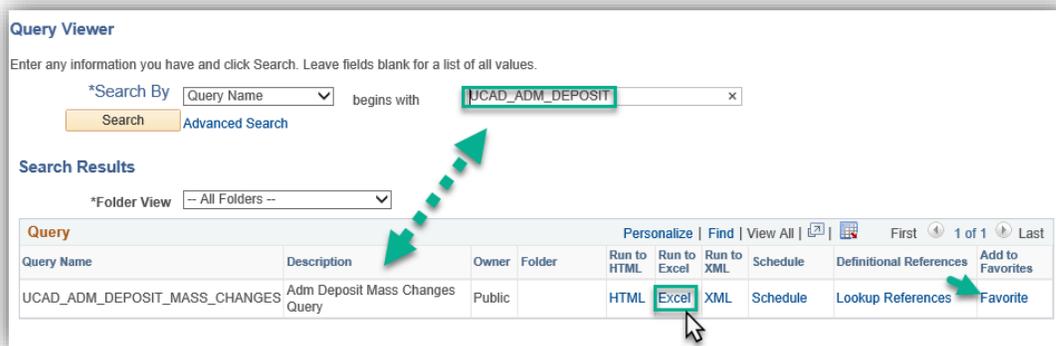   ▸ Reporting Tools

2. Click the **Query** link.

    Query

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.

    Excel

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

7. Click the **Look up Career** button and click the **UGRD** link.
    UGRD

8. Click the **Look up Admit Term From** button (e.g. Fall 2015 2157). Click the **2157** link.
    2157

9. Click the **Look up Admit Term To** button (e.g. Fall 2016 2167). Click the **2167** link.
    2167

10.　Click the **Look up Application Center** button and click the **UGRD** link.

UGRD

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:	UCALG
Career:	UGRD
Admit Term From:	2157
Admit Term To:	2167
Application Center:	UGRD
Admit Type:	
Acad Prog:	
Deg Plan:	
Major/AOS:	
Other Plan(MIN/SPC/COH/LOC):	
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.

	A	B	C	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			
	287	423			

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	B	C	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.

Save

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.

Update Applications

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.

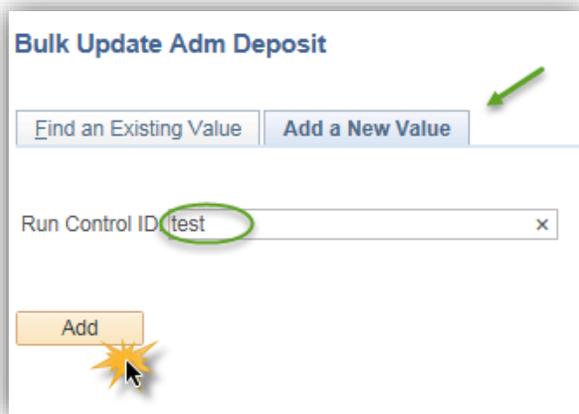Add a New Value

6. 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.

   [Add]

   Bulk Update Adm Deposit

   Find an Existing Value | **Add a New Value**

   Run Control ID test ✕

   Add

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

   ☑

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.

    [Upload]

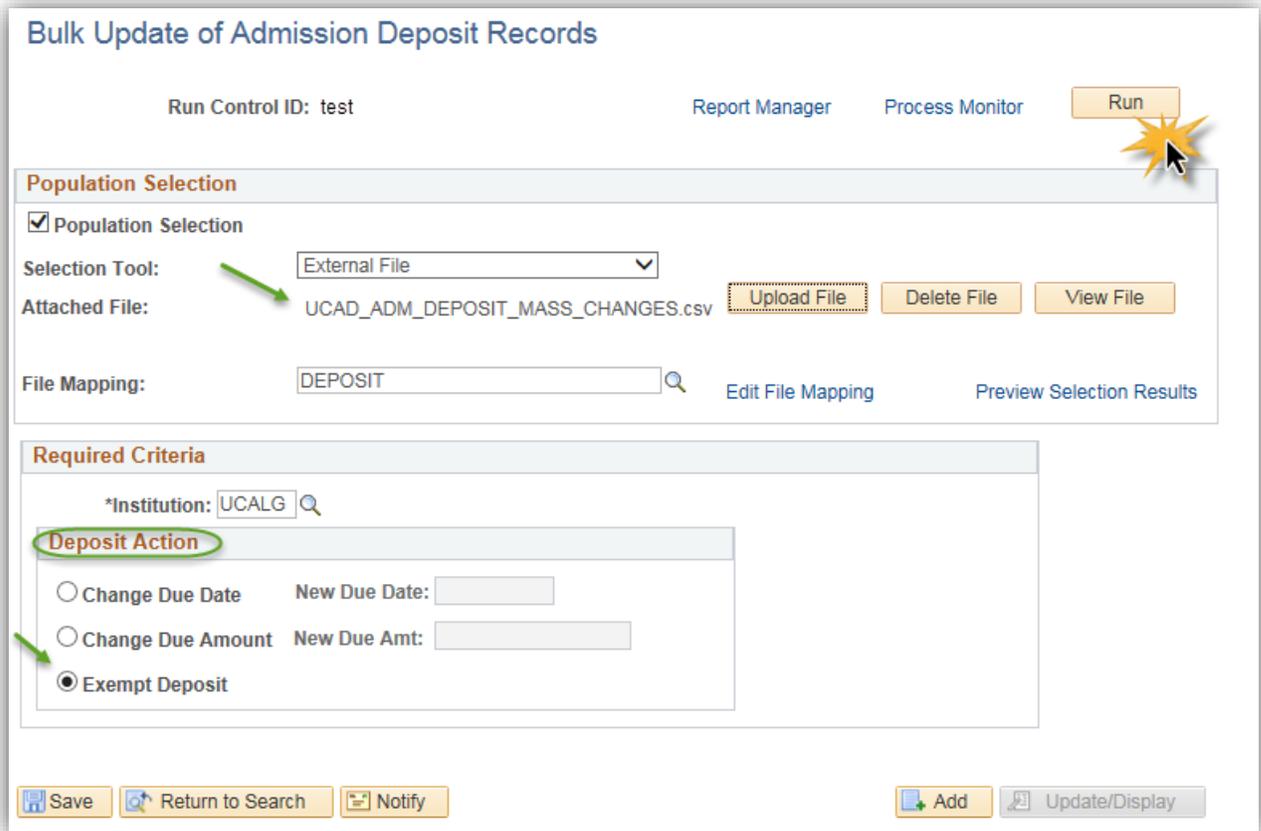11. Click the **Upload File** button.

    [Upload File]

12. After browsing/locating the .csv file click the Upload button. Click the **Upload** button.

    [Upload]

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

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

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

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.

UCADB044_ProcessUpdates.csv

June 2020

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

> → Open
> The file won

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

	A	B	C	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

ProcessUpdatesdone

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22. Return to the View Log/Trace and view the Process Errors.csv file. Click the **UCADB044_ProcessErrors.csv** link.

UCADB044_ProcessErrors.csv

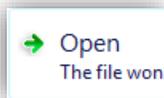| File List		
Name	File Size (bytes)	Datetime Created
AE_UCADB044_9161467.stdout	715	2017/07/06 11:34:36.589880AM MDT
UCADB044_ProcessErrors.csv	8,403	2017/07/06 11:34:36.589880AM MDT
UCADB044_ProcessUpdates.csv	309,944	2017/07/06 11:34:36.589880AM MDT

23. Click the **Open** button.

→ Open
The file won

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).

	A	B	C	D	E	F	G	H
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 is already paid or waived.
3	10056099	42333462	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
4	10085779	42373912	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
5	10136641	42363909	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
6	10172829	42330431	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
7	30003197	42374099	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
8	30008720	42330724	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
9	30009971	42323872	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
10	30016643	42308883	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
11	30016811	42309236	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
12	30017059	42374070	Exempt Deposit	125	500	0	375	Cannot exempt as student has already paid an amount
13	30018530	42312196	Exempt Deposit	0	0	0	0	Student's admission deposit is already paid or waived.
14	30020288	42314813	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
15	30020353	42314933	Exempt Deposit	0	0	0	0	Student's admission deposit is already paid or waived.
16	30021011	42315879	Exempt Deposit	0	0	0	0	Student's admission deposit is already paid or waived.
17	30021852	42317122	Exempt Deposit	0	0	0	0	Student's admission deposit is already paid or waived.
18	30021853	42317123	Exempt Deposit	0	0	0	0	Student's admission deposit is already paid or waived.
19	30021903	42317187	Exempt Deposit	0	0	0	0	Student's admission deposit is already paid or waived.
20	30022057	42317447	Exempt Deposit	0	0	0	0	Student's admission deposit is already paid or waived.
21	30022355	42317997	Exempt Deposit	0	500	0	500	Student's admission deposit is already paid or waived.
22	30022901	42318813	Exempt Deposit	0	0	0	0	Student's admission deposit is already paid or waived.
23	30023147	42347416	Exempt Deposit	0	0	0	0	Student's admission deposit is 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.