

POPULATIONS SELECTION QUESTIONS FROM THE HEUG WEBINAR

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OVERVIEW

Population Selection has not altered the processes of PeopleSoft, rather it is an enhancement of how you select a set of IDs for a particular process. As has always been the case with batch processes, you are telling the system to take some action on these IDs based on the parameters of your run control. Just as you are careful when making a manual update to a single EmplID in the system, you should also make sure your selection tool (query, external file or equation) is choosing only those IDs you wish to update.

CHOOSE YOUR SELECTION TOOL

PS Query | External File | Equation Engine



SELECT POPULATION

Use the tool to choose the IDs for the process.



RUN PEOPLESOFT PROCESS

PS Process uses the IDs chosen with Pop Selection and updates them according to the Run Control settings and parameters.

The purpose of the Population Selection Tool is to choose a desired set of people or organizations.

The end user is still responsible for verifying that the tool selected the appropriate cohort of IDs

The tool provides the IDs for the process.

Important: The process will affect each ID in the population.

The PS Process will use the selected IDs and the parameters set forth by the run control to run the process

Important: Pop Select will not change the delivered processes.



A NOTE FROM THE PRESENTER

Due to the limited time, a few people asked if we would be willing to do a follow up session on Population Selection. HTS would be glad to offer a follow up session, which would include our module leads to clarify some of the benefits of Pop Select in each of the modules as well as a demonstration of the external file and equation engine feature of Pop Select. Please email me directly at msullivan@htsglobal.com if you are interested in joining us.

We condensed all of the submitted questions into the following categories, including those that I didn't have time to address during the webinar. If you have further questions, please feel free to email me at msullivan@htsglobal.com.

Thanks for attending,

Megan



POP SELECT MANAGEMENT & DESIGN RELATED QUESTIONS

What is the file format for external files in Population Selection?

Population Selection can use either a **flat file** or a **delimited file**:

- A **flat file** is a file (usually a .txt file) in which each field has a specific length, and if a value is shorter than that length, it must be padded by spaces. For example, if the ID field is 10 characters and an ID in your population is 12345, you would have to follow the ID with five spaces in order for the process to run correctly. Each individual person or organization must be on a separate line.
- A **delimited file** is a file (usually a .csv file) in which each field is separated by a delimiter. PeopleSoft allows the following delimiters: Comma (default value), Pipe, Semicolon or Tab. Each individual person or organization must be on a separate line.

The only values required in the file are the required fields in the Context Definition (usually just the Empl ID or Org ID). In order to use an external file, you must first define the file mapping on the File Mapping Definition page.

It doesn't matter what program you use to create the file (Word, Notepad, Excel, etc), you just need to save it in the correct format.

What are the audit features of Populations Selections?

Since Population Selection is just a tool to choose IDs, the audit features would be within the delivered functionality. Any process with an audit capability will still have this capability.

How is Pop Select used in Comm. Generation?

Population Selection is not actually used within the Communication Generation process. Pop Select can be used within 3C Engine to select the IDs to which you wish to assign a communication. You could then use Communication Generation to create those communications.

Is there a specific position of the BIND Record?

It can be placed anywhere in the query or equation, the key is that it is present.

What is the BIND record's purpose?

Population Selection has to know which fields are required to run a particular process. The BIND record contains those required fields.

Important: Like all query tables, the bind records must be defined in the query tree so a user can refer to it.



Who can create a Pop Select Context Definition?

In order to create a Pop Select Context Definition, you must have security access to the Context Definition component.

The list of delivered Pop Select Contexts is provided in the Population Selection Quick Guide.

Can we configure Pop Select to take multiple actions on a given population? For example update certain records (with certain criteria) and delete data from other records? Or can Pop Select be dynamic and exempting selected students from a Population Selection query and process others in another way?

Population Selection does not have a feature to select a list of students and then exempt a set within that list. To select a more accurate cohort of students, perhaps you could use the Equation Engine or PS Query to select a population, edit the results and save them as an external file and then use Population Selection with that external file.

Remember Pop Selection is just a tool to gather the IDs. The delivered process using Pop Select will dictate what is done with those IDs. With that said, to our knowledge, there aren't any delivered processes that add some students while deleting others.

Is Pop Select a sort of ad hoc reporting tool?

No. Pop Select uses the ad hoc nature of Equation Engine and PS Query or an external file to select exactly the IDs you need within a particular process.

When using external file, do you have the option to preview results or are you only able to preview the external file?

The IDs in the external file, which you are previewing, are the IDs the process will use.

Is there a way to have more than 300 students in the Preview?

Yes, this limit can be set up in Populations Selection's Selection Tool component:

Navigation:

Set Up SACR > System Administration > Utilities > Population Selection > Selection Tool

Can Pop Select be added to other processes where not delivered?

Yes, Pop Select can be added to other processes but will require significant technical assistance and in many cases, your institution may consider it a modification and it will need to be managed as such.



Any gotchas with Pop Select?

The main gotcha is that you have to include the Bind Record in the equation or query. Also, understand that once you select the IDs and run them through the respective process, it is difficult to undo a run control process, so take care when running the selected process.

Any known bugs with Pop Select?

We are unaware of any bugs at this time.

QUERY RELATED QUESTIONS

What are the query security implications of Pop Selection?

Your query security will apply in Population Selection. The queries available for you to choose from the drop down list will only be those you have security to view and/or edit. So if you can't see a query when you are in Query Manager or Query Viewer, you will not be able to see the query when trying to select it in Pop Selection. Queries must either be public or created by you.

How does Pop Select manage the time out Issue for large amount of data rows?

If a query times out when you run it in Query Manager, it will do the same in Population Selection. So if you choose queries that will time out, it will do the same and the process using that query will also fail. For this reason, it is vital for you to use the preview feature or test it in Query Manager prior to using in Population Selection and make sure your queries are written efficiently.



Is there a limit on the number of rows?

Technically, there is no limitation as to the number of students a process can run, so if your query returns a large set of rows, the process will go through each one. This may stress the system or take a long time so it is suggested to write effective, efficient queries.

PeopleSoft has provided some recommendations:

- o Equation Engine tool maximum is 100,000.
- o PS Query tool maximum is 50,000.
- o External file tool maximum is 10,000.

These limits can be setup in Populations Selection's Selection Tool component:

Navigation:

Set Up SACR > System Administration > Utilities > Population Selection > Selection Tool

| Tool Configuration | |
|------------------------|---|
| *Application Class | SCC_POP_SELECT:MODEL:Adapters:FileParserAdapter |
| *Selection View | SCCPS_FILE_VW File Parser / Pop Select ww |
| *Selection Label | File Mapping |
| Maximum Results Rows | 10,000 (0 = Unlimited) |
| | <input checked="" type="checkbox"/> Enable Preview Results |
| Maximum Preview Rows | 300 (0 = Unlimited) |
| | <input checked="" type="checkbox"/> File Input Support File Option Attachment |
| URL Identifier | SCCFP_FILE_PARSER File Parser URL for attachment |
| Max File Size (Kbytes) | 1,000,000 |



PROCESS RELATED QUESTIONS

If the process did error out, will it do a "rollback" or is there a way to undo a process once run?

Pop Select is just providing the IDs for a process, so this roll back would have to be defined within the process (run control) and in many processes there are no rollback feature. We would suggest you set the commitment frequency to a very high number in your run control so the process will only write once it is successfully completed.

Understand that the Pop Select is not the process that writes to the system. The delivered PS process is what takes the IDs and writes to the database. Population Selection is just a tool to gather the cohort of IDs. Just as when you perform a transaction manually, in many cases there is no way to undo the transaction in PS without technical assistance. If the process has a delivered process to undo, you can run the same set of ID through the undo process. This undo feature is not common in most delivered process. For example, the Service Indicators batch process has both an assign and a release run control. However, understand even with service indicators, PS keeps a history of the transaction and the removal of the service indicators is really an inactivation of the service indicator and not a deletion of the previous transaction in which you added the service indicator. For this reason, it is vital for you to use the preview feature to ensure you have the right selection of IDs.

How does Pop Selection use queries with duplicate rows of a student ID?

Our first recommendation is you should not use a query with duplicate EmplIDs. We suggest that you remove duplicate EmplIDs by using the Distinct check box on the Query Properties page when you are building your query.

The key here is the end user has to determine which query meets the needs for the process. You may want to export and edit the query and save it as an external file or use the Equation Engine if you can't get the query to meet your needs appropriately.

What are the Impacts of re-running a process with a new query?

This is also not dictated by Pop Select, rerunning a process with a different query will not affect previously applied transactions to an ID. The impacts of re-running a set of students will be determined by the run control parameters of the process.

Does Pop Select update student information based on a Pop Select query?

The question was asked if the population selection could compare a query with the students already in the record (tbl) and remove those that are not in the query. The answer is NO, Population Selection does not have a special compare feature. Population Selection is just allowing you to define your cohorts for a specific process.



The process will apply the transaction to the IDs selected in the current list. We are unaware of any delivered PS processes that will go in and remove an ID because that ID is not on a list and add others that are on that list.

Important: Pop Select will not reduce user error if a wrong set of IDs is provided.

Can Pop Select work without a Run Control?

No, most processes use run controls to define the parameters of the process. Run controls determine the parameters for the process and it is within the run control that you use Pop Select to define your population.



REQUEST FOR FOLLOW UP SESSIONS

In the Admissions Mass Change and the 3C Engine to assign and send communications (publications, letters, and checklists) would you please consider a follow-up Webinar for how Pop Select works specific to admissions?

We would be glad to do a follow up session if you are interested, please email msullivan@htsglobal.com and we can have one of our Admissions SME do a session for anyone who is interested. Our session at the HEUG Conference will also showcase this functionality.

HEUG Session

Streamlining Admit Letters using XML Publisher and CommGen

Date & Time: Mar 24, 2009 (11:10 AM - 12:10 PM)

Can you provide the steps or show mapping data from an external load file?

Population Selection can use either a **flat file** or a **delimited file**:

- A **flat file** is a file (usually a .txt file) in which each field has a specific length, and if a value is shorter than that length, it must be padded by spaces in the file. For example, if the ID field is 10 characters and an ID in your population is 12345, you would have to follow the ID with five spaces in order for the process to run correctly. Each individual person or organization must be on a separate line.
- A **delimited file** is a file (usually a .csv file) in which each field is separated by a delimiter. PeopleSoft allows the following delimiters: Comma (default value), Pipe, Semicolon or Tab. Each individual person or organization must be on a separate line.

The only values required in the file are the required fields in the Context Definition (usually just the Empl ID or Org ID). In order to use a flat file, you must first define the file mapping on the File Mapping Definition page.

It doesn't matter what program you use to create the file (Word, Notepad, Excel, etc), you just need to save it in the correct format.

We can provide the step-by-step process, as it is fairly simple process, please email us. We can do a follow up workshop if there is enough interest, please email msullivan@htsglobal.com

Could you demonstrate the use of Equation Engine in Population Select?

Due to the limited time, we were unable to show the Equation Engine feature, but we can do a follow up session if there is enough interest, please email msullivan@htsglobal.com.



Could you do a quick run-through about Pop Select with 3C Engine to assign communication?

Due to time constraints, we were not able to show all the areas that Pop Select can be used. We are doing a session at the HEUG Alliance conference where we are showing how to use 3C Engine with Admission Letters and we encourage you to try to attend.

However, if you are unable to attend Alliance, we would be glad to do the same session online if there is interest, please email msullivan@htsglobal.com.



MODULE SPECIFIC QUESTIONS

Admissions

- 1. Can it assign Application Evaluation Process in ADM?**
No, unfortunately PeopleSoft didn't deliver Applicant Evaluation assignment as part of the Population Selection package.
- 2. Do your queries for 3C engine have to be named QA_CC..?**
No, you can name the Population Selection queries anything you would like. In fact, we would not recommend naming them QA_CC as these are the delivered PeopleSoft Population Selection queries. Our recommendation is XXX_POP_ZZ (XXX = institution code and ZZ module code; example HTS_POP_AD for admission population selection queries).
- 3. Can the preview results be downloaded?**
The previewed results do not have an export feature. You can download the results using Query Manager.
- 4. Is there only one bind record (SCC_PS_ADMA_BND) available for 3C Engine?**
No, there is a bind record for each Administrative Function.

Student Financials

- 1. Can it turn on Tuition Calc Required flag in SF?**
Yes. There is a process called Population Update that helps achieve this. This is different than the Pop Select process. The Pop Update process uses the Pop Select process to get the required population to turn on the Tuition Calc Required flag.
- 2. What is the process for more SF related processes to be delivered?**
This question should be directed to Oracle. We will email Oracle Product Strategy and let you know. If you are interested, please email malex@htsglobal.com so a response can be sent to you.
- 3. Can Pop Select be used to populate Create Group Data Entries for billing purposes?**
Yes. Pop Select can be used to create a Student Group and then that Student Group can be linked to the Billing Standard Request to process bills only for those selected students.



Student Records

1. Like Service Indicator Mass Release, is there a Mass Removal for Student Groups?

Yes, Pop Selection is now available for Student Groups where you can activate and inactive a cohort of students in a Student Group.

Navigation: *Career and Program Information > Process Student Groups*

2. Can you use Pop Select on Course Catalog or Schedule of Classes data?

Not currently.

3. Can Pop Select be added to the non-XML transcript request process?

PS is not delivered with Pop Select for the non-XML transcript request. As mentioned previously, you can add Pop Select to any process with significant programming effort. However, in general, we recommend the XML transcript request process, as it's more dynamic and can be more flexible in meeting your school's needs.

4. I know you can mass assign checklist items using this process can you mass assign comments to a group of students?

Yes, using the 3C Engine.