

SERVICE INDICATORS

- Use service indicators to provide or limit access to services at your institution for an individual. Service indicators can be holds to prevent an individual from receiving certain services, or positive indicators to designate special services to be provided.
- Service indicators consist of one or more impact values that identify the types of specific services that are restricted or provided.
- This document contains instructions on how to Mass Add a Service Indicator, and a Mass Release a Service Indicator.
- The Mass Add service indicator process adds the service indicator to multiple accounts.
- **NOTE: The Start Term is the appropriate way to assign a hold. The start date is not required because the field automatically defaults to the start of the term.**

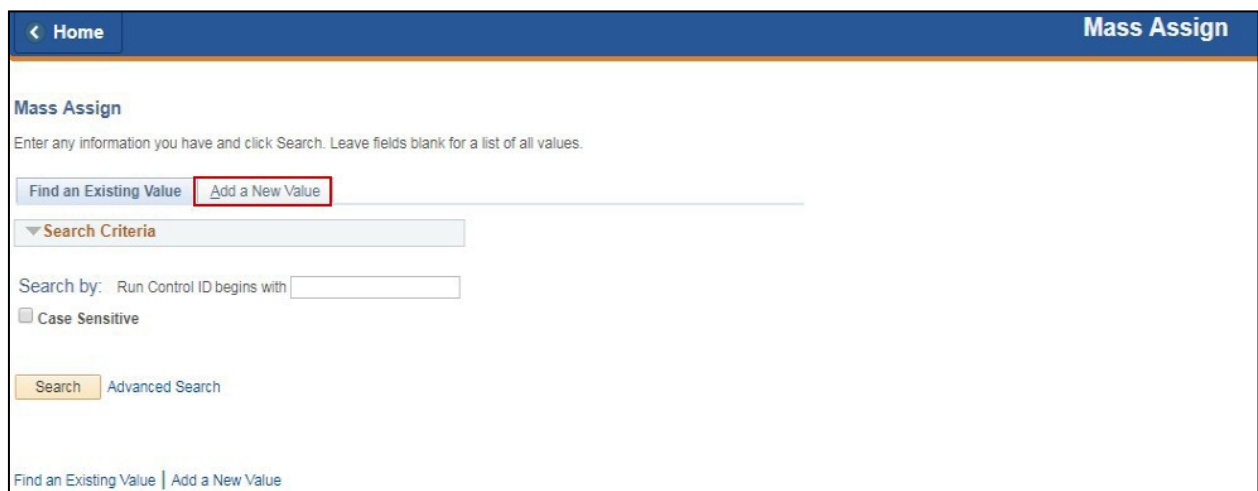
NAVIGATION

After logging into myUFL, use the following navigation path:

[myUFL](#) > [NavBar](#) > [Main Menu](#) > [Student Information System](#) > [Campus Community](#) > [Person](#) > [Mass Assign](#)

MASS ASSIGN A SERVICE INDICATOR

1. Click the **Add a New Value** tab.



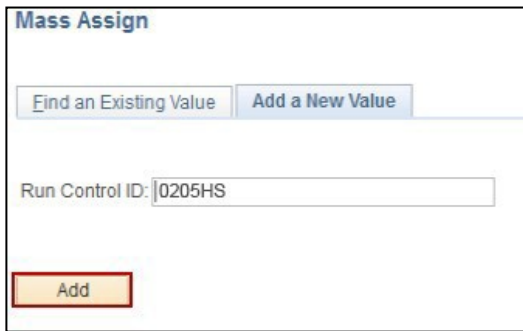
The screenshot shows the 'Mass Assign' page in the myUFL system. At the top, there is a navigation bar with a back arrow and 'Home' on the left, and 'Mass Assign' on the right. Below the navigation bar, the page title 'Mass Assign' is displayed. A sub-header reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' and 'Add a New Value', with the latter being selected and highlighted with a red box. Below the tabs is a search criteria dropdown menu. Underneath, there is a 'Search by:' field with the text 'Run Control ID begins with' and an input field. A 'Case Sensitive' checkbox is also present. At the bottom of the search section, there are 'Search' and 'Advanced Search' buttons. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

2. In the Run Control ID field, enter **today's date followed by your initials**.



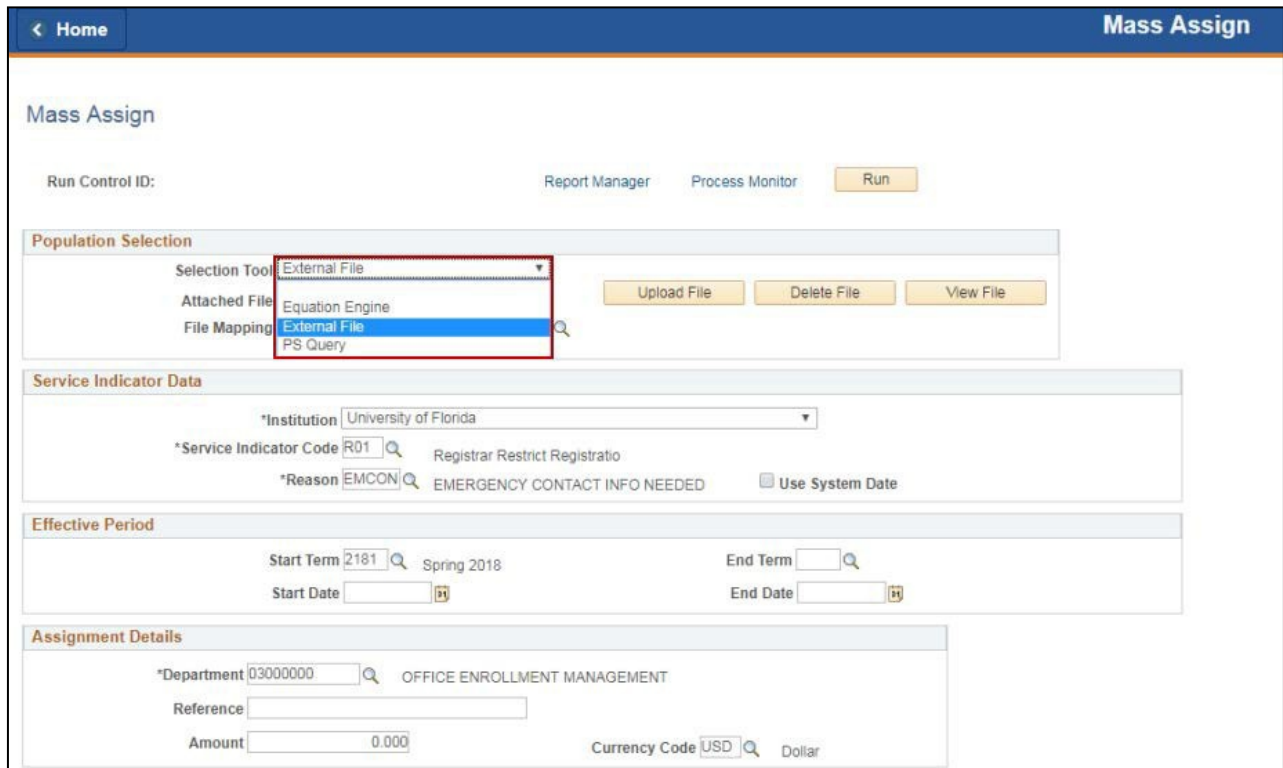
The screenshot shows a close-up of the 'Mass Assign' page. The 'Add a New Value' tab is selected. The 'Run Control ID:' label and its corresponding input field are highlighted with a red box. Below the input field is an 'Add' button.

3. Click **Add**.



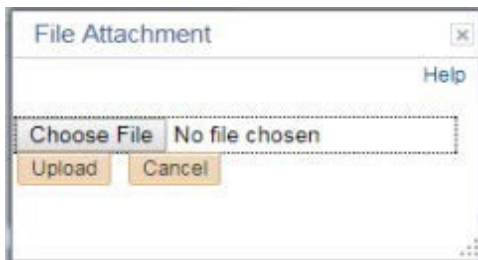
The screenshot shows a form titled "Mass Assign". At the top, there are two buttons: "Find an Existing Value" and "Add a New Value". Below these is a text input field labeled "Run Control ID:" containing the value "0205HS". At the bottom of the form, the "Add" button is highlighted with a red border.

4. From the Selection Tool dropdown menu, select **External File**.



The screenshot shows the "Mass Assign" form with the "Selection Tool" dropdown menu open. The menu options are "External File", "Equation Engine", "External File", and "PS Query". The "External File" option is highlighted in blue. The form also includes fields for "Run Control ID:", "Report Manager", "Process Monitor", and "Run". Other sections include "Population Selection" with "Attached File" and "File Mapping" fields, "Service Indicator Data" with "Institution", "Service Indicator Code", and "Reason" fields, "Effective Period" with "Start Term", "End Term", "Start Date", and "End Date" fields, and "Assignment Details" with "Department", "Reference", "Amount", and "Currency Code" fields.

5. Select the file you want to upload. Then, click **Upload**.



The screenshot shows a "File Attachment" dialog box. It has a "Choose File" button and a "No file chosen" label. Below these are "Upload" and "Cancel" buttons. There is also a "Help" button in the top right corner.

- Click look up icon (magnifying glass) to view the **File Mapping**.

Mass Assign
 Run Control ID: UF_SR_TEST Report Manager Process Monitor Run

Population Selection
 Selection Tool: External File
 Attached File: MFOS_csv.csv Upload File Delete File View File
 File Mapping: Create File Mapping

- Click the **Look Up** button. Next, click the **File Mapping Name**.

Look Up File Mapping Help
 Search by: File Mapping Name begins with

Search Results
 View 100 First 1 of 1 Last

File Mapping Name
ID FOR SI

- Enter the **Service Indicator Code**.

Home Mass Assign
 Mass Assign
 Run Control ID: Report Manager Process Monitor Run

Population Selection
 Selection Tool: External File
 Attached File: Book1.xlsx Upload File Delete File View File
 File Mapping:

Service Indicator Data
 *Institution: University of Florida
 *Service Indicator Code
 *Reason Use System Date

Effective Period
 Start Term: End Term:
 Start Date: End Date:

Assignment Details
 *Department:
 Reference:

9. Enter the Reason.

Mass Assign
 Run Control ID: Report Manager Process Monitor Run

Population Selection
 Selection Tool: External File
 Attached File: Book1.xlsx Upload File Delete File View File
 File Mapping:

Service Indicator Data
 *Institution: University of Florida
 *Service Indicator Code: R01
 *Reason: Use System Date

Effective Period
 Start Term: End Term:
 Start Date: End Date:

Assignment Details
 *Department: Reference: Amount: 0.000 Currency Code: USD Dollar

10. Enter the Start Term. The Start Date field should **not** be used.

Mass Assign
 Run Control ID: Report Manager Process Monitor Run

Population Selection
 Selection Tool: External File
 Attached File: Book1.xlsx Upload File Delete File View File
 File Mapping:

Service Indicator Data
 *Institution: University of Florida
 *Service Indicator Code: R01 Registrar Restrict Registratio
 *Reason: EMCON Use System Date

Effective Period
 Start Term: 0000 Begin Term - Svc Indicatr Use End Term:
 Start Date: End Date:

Assignment Details
 *Department: Reference: Amount: 0.000 Currency Code: USD Dollar

11. Click **Run**.

Mass Assign
 Run Control ID: Report Manager Process Monitor **Run**

Population Selection
 Selection Tool: External File
 Attached File: Book1.xlsx
 File Mapping:

Service Indicator Data
 *Institution: University of Florida
 *Service Indicator Code: R01 Registrar Restrict Registratio
 *Reason: EMCON EMERGENCY CONTACT INFO NEEDED Use System Date

Effective Period
 Start Term: 2181 Begin Term - Srvc Indicatr Use End Term:
 Start Date: End Date:

Assignment Details
 *Department: 03000000 OFFICE ENROLLMENT MANAGEMENT
 Reference:
 Amount: 0.000 Currency Code: USD Dollar

12. Click the **checkbox** next to "SCC_SI_ASSN". Then, click **Ok**.

Batch Service Indicators Mass Assign
 Process Scheduler Request

User ID: Run Control ID:

Server Name: Run Date: 02/05/2018
 Recurrence: Run Time: 11:32:10AM
 Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Publish Assign Service Ind	EIPSIASG	PSJob	(None)	(None)	Distribution
<input checked="" type="checkbox"/>	SCC_SI_ASSN	SCC_SI_ASSN	Application Engine	Web	TXT	Distribution

13. Verify:

- Run Status says “Success”
- Distribution status says “Posted”

The screenshot shows the 'Batch Service Indicators' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below this is a 'View Process Request For' section with various filters: User ID, Type, Last, Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. A 'Refresh' button is also present. Below the filters is a 'Process List' table with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains one row with Instance 19567, Process Type Application Engine, Process Name SCC_SI_ASSN, User 10000101, Run Date/Time 02/05/2018 11:32:10AM EST, Run Status Success, and Distribution Status Posted. The 'Success' and 'Posted' cells are highlighted with a red border. At the bottom, there are buttons for 'Save' and 'Notify', and a link to 'Go back to Mass Assign'.

14. Also go to: [myUFL > NavBar > Main Menu > Student Information System > Campus Community > Person > Manage Service Indicators](#) to verify that the new service indicator displays on the Manage Service Indicator page.

MASS RELEASE SERVICE INDICATORS

- The Mass Release service indicator process releases service indicators from multiple accounts.

NAVIGATION

After logging into myUFL, use the following navigation path:

[myUFL > NavBar > Main Menu > Student Information System > Campus Community > Person > Mass Release](#)

MASS RELEASE A SERVICE INDICATOR

1. Enter the **Run Control ID** of the service indicator batch you want to release. The Run Controls ID may exist if the user has already run a process. Run Control IDs can be reused, or users can create new ones.

< Process List

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

▼ Search Criteria

Search by: Run Control ID begins with UF_SR_TEST

Case Sensitive

Search | Advanced Search

Find an Existing Value | Add a New Value

2. Click **Search**.

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

▼ Search Criteria

Search by: Run Control ID begins with UF_SR_TEST

Case Sensitive

Search | Advanced Search

3. Click the **Run Control ID**.

[← Process List](#)

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](#)

▼ **Search Criteria**

Search by: Run Control ID begins with

Case Sensitive

[Search](#) [Advanced Search](#)

Search Results

[View All](#) [First](#) [1 of 1](#) [Last](#)

Run Control ID
UF_SR_TEST

[Find an Existing Value](#) | [Add a New Value](#)

4. Click **Run**.

< Process List
Mass Release

Mass Release

Run Control ID: 0120ab1 Report Manager Process Monitor **Run**

Population Selection

Selection Tool: External File

Attached File: Book1.xlsx Upload File Delete File View File

File Mapping: ID Edit File Mapping Preview Selection Results

Service Indicator Data

*Institution: University of Florida

*Service Indicator Code: R01 Registrar Restrict Registratio

*Reason: EMCON EMERGENCY CONTACT INFO NEEDED

Effective Period

Start Term: 2181 Spring 2018 End Term:

Start Date: End Date:

5. Click the **checkbox** next to "SCC_SI_ASSN". Then, click **Ok**.

< Batch Service Indicators

Process Scheduler Request

User ID: Run Control ID:

Server Name: Run Date: 02/05/2018

Recurrence: Run Time: 11:32:10AM Reset to Current Date/Time

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Publish Assign Service Ind	EIPSIASG	PSJob	(None)	(None)	Distribution
<input checked="" type="checkbox"/>	SCC_SI_ASSN	SCC_SI_ASSN	Application Engine	Web	TXT	Distribution

OK Cancel

6. Verify:

- Run Status says “Success”
- Distribution status says “Posted”

The screenshot shows the 'Batch Service Indicators' interface. At the top, there is a blue header with a back arrow and the text 'Batch Service Indicators'. Below this, there are two tabs: 'Process List' (selected) and 'Server List'. A section titled 'View Process Request For' contains several search and filter fields: 'User ID' with a search icon, 'Type' with a dropdown menu, 'Last' with a dropdown menu, a numeric field with '1' and a 'Days' dropdown, a 'Refresh' button, 'Server' with a dropdown menu, 'Name' with a search icon, 'Instance From' and 'Instance To' fields, 'Run Status' with a dropdown menu, 'Distribution Status' with a dropdown menu, and a checked 'Save On Refresh' checkbox. Below this is a 'Process List' table with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains one row with the following data: Instance 19567, Process Type Application Engine, Process Name SCC_SI_ASSN, User 10000101, Run Date/Time 02/05/2018 11:32:10AM EST, Run Status Success, and Distribution Status Posted. The 'Success' and 'Posted' cells are highlighted with a red border. Below the table, there are links for 'Go back to Mass Assign', 'Save' and 'Notify' buttons, and a footer with 'Process List | Server List'.

7. Also go to: **myUFL > NavBar > Main Menu > Student Information System > Campus Community > Person > Manage Service Indicators** to verify that the service indicator was released.

ADDITIONAL HELP

Further resources are available at <http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/>.

For help with technical issues, contact the UF Computing Help Desk at 352-392-HELP or helpdesk@ufl.edu.

For assistance with processes or policies related to Service Indicators, contact the Office of the University Registrar, 352-392-1374 or <https://registrar.ufl.edu/>