

## STUDENT GROUPS - ACTIVATING & INACTIVATING A STUDENT

Student Groups are any identified group to be tracked and they can also be used to manage enrollment, immunization requirement, and mandatory health insurance requirements, among other things.

Some examples of Student Groups include specific distance-learning cohorts, student veterans, preview, and students participating in a study abroad programs.

### NAVIGATION

1. Click **Main Menu**
2. Click **Student Information System**
3. Click **Records and Enrollment**
4. Click **Career and Program Information**
5. Click **Student Groups**

### ACTIVATING A STUDENT

Use the following steps to activate a student.

1. Search for a student by entering the student's UFID in the **ID** field. Be sure to check the **Include History** checkbox, then click **Search**.

**Student Groups**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

ID: begins with 12345678

Campus ID: begins with

National ID: begins with

Last Name: begins with

First Name: begins with

Include History  Case Sensitive

Search Clear Basic Search Save Search Criteria

2. Locate the desired student group by either entering the code in the **Student Group** field or using the **look-up** tool (magnifying glass). *NOTE: if the student is already in a student group, you can add a new student group row by clicking the **plus sign (+)**.*

**Student Groups**

Caroline Babbit 12345678 ★

Academic Institution Details Find | View All First 1 of 1 Last

\*Academic Institution UFLOR University of Florida

\*Student Group

+ -

3. Enter the **Effective Date** and the **Effective Status**. The Effective Status defaults to **Active** when you add a new row. If necessary, you can also add comments to the **Comment** box.
4. Click the **Save** button to save your work.

The screenshot shows the 'Student Groups' form for Caroline Babbit (ID: 12345678). The 'Academic Institution Details' section shows 'UFLOR' for the institution and 'VM - The Dog Course - self fun' for the student group. The 'Details' section has 'Effective Date' set to 01/08/2018 and 'Status' set to Active. A 'Comments' text area is present below. At the bottom, the 'Save' button is highlighted with a red box, along with 'Return to Search', 'Notify', 'Update/Display', and 'Include History' buttons.

*NOTE: Generally, the Effective Date for an Active student group should be the begin date of the term, and the Effective Date for an Inactive student group should be the end date of the term.*

## INACTIVATING A STUDENT

Use the following steps to activate and inactivate a student.

1. Search for a student by entering the student's UFID in the **ID** field. Be sure to check the **Include History** checkbox, then click **Search**.

The screenshot shows the 'Student Groups' search form. It includes a 'Find an Existing Value' button and a 'Search Criteria' section. The 'ID' field is set to 'begins with 12345678'. Other fields for Campus ID, National ID, Last Name, and First Name are also present. The 'Include History' checkbox is checked, and the 'Case Sensitive' checkbox is unchecked. The 'Search' button is highlighted with a red box, along with 'Clear', 'Basic Search', and 'Save Search Criteria' buttons.

- On the next page, you can see the student groups (that you have access to view) of the student. If the student is a member of multiple student groups, you can use the **Academic Institution Details** section **arrows** to navigate to the student group that needs to be inactivated.

**Academic Institution Details**

Rhett Gordon 87654321 ★

Academic Institution Details Find | View All First 1 of 1 Last

\*Academic Institution UFLOR University of Florida

\*Student Group DOG VM - The Dog Course - self fun

Details Find | View All First 1 of 1 Last

\*Effective Date 02/10/2014 \*Status Active

Comments  
COHORT BEGIN TERM: 20151  
COHORT END TERM:  
ADDED/UPDATED ON: 10-FEB-14 07.33.28.691047000 PM  
ADDED/UPDATED BY: RA50IAMC  
NOTE: -

Last Update Date/Time 11/02/2017 9:08:20AM by UF\_CONVERSION Type SCC\_STD\_GRP

Save Return to Search Notify Update/Display Include History

- Once you have located the desired student group, click on the **plus sign (+)** in the **Details** section.

**Details**

Rhett Gordon 87654321 ★

Academic Institution Details Find | View All First 1 of 1 Last

\*Academic Institution UFLOR University of Florida

\*Student Group DOG VM - The Dog Course - self fun

Details Find | View All First 1 of 1 Last

\*Effective Date 02/10/2014 \*Status Active

Comments  
COHORT BEGIN TERM: 20151  
COHORT END TERM:  
ADDED/UPDATED ON: 10-FEB-14 07.33.28.691047000 PM  
ADDED/UPDATED BY: RA50IAMC  
NOTE: -

Last Update Date/Time 11/02/2017 9:08:20AM by UF\_CONVERSION Type SCC\_STD\_GRP

Save Return to Search Notify Update/Display Include History

4. Change the **Effective Date** to the end of term date and the **Status** to **Inactive**, then click the **Save** button. After clicking Save, the student has been inactivated from the student group, as of the effective date entered.

The screenshot shows the 'Student Groups' interface. At the top, it displays 'Rhett Gordon' and '87654321'. Below this is the 'Academic Institution Details' section, which includes search filters for '\*Academic Institution' (UFLOR) and '\*Student Group' (DOG). The main 'Details' section contains a table with columns for 'Effective Date', 'Status', and 'Type'. The 'Effective Date' is set to '12/15/2017' and the 'Status' is set to 'Inactive'. The 'Type' is 'Manual'. A red box highlights the 'Effective Date' and 'Status' fields. Another red box highlights the pagination controls, which show '1 of 2' rows, indicating that a new row has been added. A red arrow points from the '1 of 2' text to the 'Details' section. Below the table, there is a 'Comments' section with the following text: 'COHORT BEGIN TERM: 20151', 'COHORT END TERM:', 'ADDED/UPDATED ON: 10-FEB-14 07.33.28.691047000 PM', 'ADDED/UPDATED BY: RA50IAMC', and 'NOTE: -'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', and 'Include History'.

*NOTE: The **Details** section now says **1 of 2**. This means, a new row has been successfully added.*

#### ADDITIONAL HELP

##### Office of the University Registrar

352-392-1374

<https://registrar.ufl.edu/>

##### Student Groups myUFL Toolkit

<http://hr.ufl.edu/learnandgrow/toolkits-resource-center/student-information-systems/student-groups/>

##### UF Computing Help Desk

352-392-HELP (4357)

<http://helpdesk.ufl.edu/>

## STUDENT GROUPS – PROCESSING MULTIPLE STUDENTS AT ONCE

Student Groups are any identified group to be tracked and they can also be used to manage enrollment, immunization requirement, and mandatory health insurance requirements, among other things.

Some examples of Student Groups include specific distance-learning cohorts, student veterans, preview, and students participating in a study abroad programs.

The most common way to add multiple students to a student group is through a file upload, using a **.CSV** file.

### CREATE A .CSV FILE

Before logging into myUFL, create a spreadsheet of the students who need to be activated or inactivated in the student group. Key things to remember when creating the spreadsheet:

- UFID must be in the first column
- Do **not** include any headers
- Save the file as a “.CSV”

An example .CSV file can be found [here](#).

### NAVIGATION

Once you have created your .CSV file, login to myUFL and navigate to the **Process Student Groups** page.

6. Click **Main Menu**
7. Click **Student Information System**
8. Click **Records and Enrollment**
9. Click **Career and Program Information**
10. Click **Process Student Groups**

### UPLOADING A .CSV

5. For a new Student Group, click on the **Add a New Value** tab and create a run control. You will want to create a run control ID that describes the purposed the process that could be used in the future. In the example to the right, we want to run a process that will put students into a student group with a status of Active using an external file.

6. Click the **Add** button.

The screenshot shows the 'Process Student Groups' page. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected and highlighted with a red box. Below the tabs is a text input field labeled 'Run Control ID:' containing the text 'TEST\_STGRP\_POP\_SEL\_ACTIVE\_file', also highlighted with a red box. Below the input field is a yellow 'Add' button, highlighted with a red box. At the bottom of the page, there are two links: 'Find an Existing Value' and 'Add a New Value'.

7. Choose **External File** from the **Selection Tool** dropdown menu.

Process Student Groups

Run Control ID: TEST\_STGRP\_POP\_SEL\_ACTIVE\_file      Report Manager      Process Monitor      Run

**Population Selection**

Population Selection

Selection Tool: Equation Engine

Query Name: External File

8. Click the **Upload File** button.

Process Student Groups

Run Control ID: TEST\_STGRP\_POP\_SEL\_ACTIVE\_file      Report Manager      Process Monitor      Run

**Population Selection**

Population Selection

Selection Tool: External File

Attached File

File Mapping

Upload File      Delete File      View File

9. Select your **.CSV** file then click the **Save** button.

Save As

(H:) Home

Organize      New folder

Name	Date modified	Type	Size
student_groups.csv	11/16/2017 12:03 ...	Microsoft Excel C...	1 KB

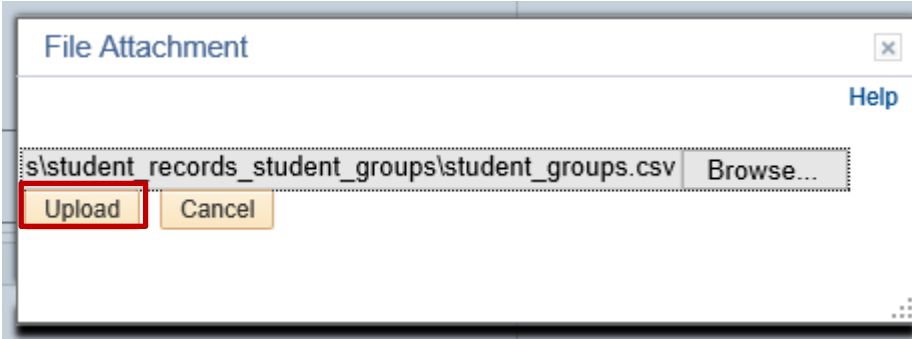
File name: student\_groups.csv

Save as type: CSV (Comma delimited) (\*.csv)

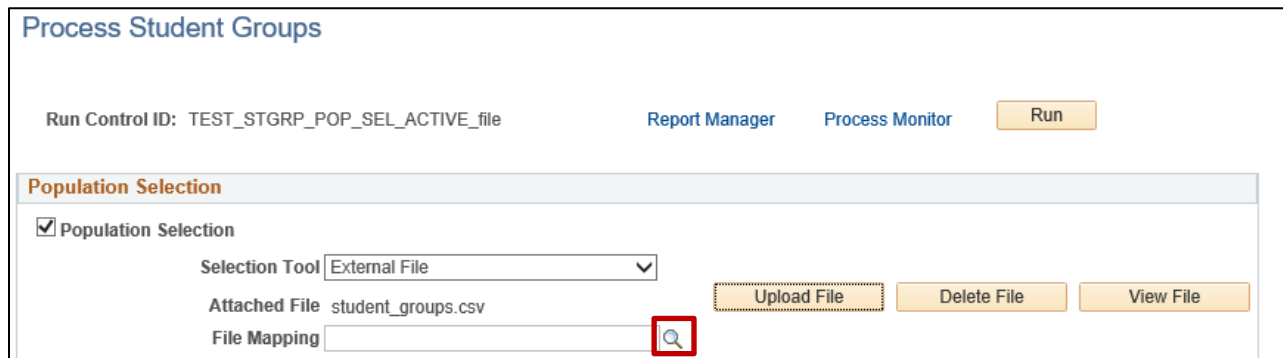
Authors:      Tags: Add a tag      Title: Add a title

Hide Folders      Tools      Save      Cancel

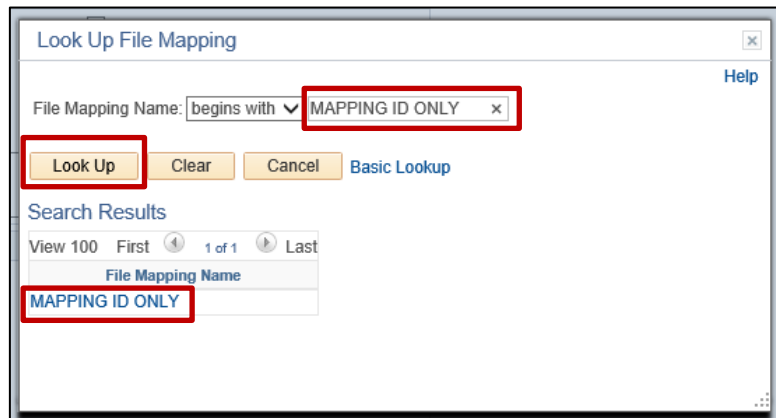
10. Click the **Upload** button.



11. Click the **Look-up icon** (magnifying glass) next to the **File Mapping** field.



12. In the File Mapping Name begins with field, enter **MAPPING ID ONLY**, then click the **Look up** button. In the populated list, select the **MAPPING ID ONLY** option.



13. Click the **Preview Selection Results** link to view the UFIDs of the students in the .CSV file.

Process Student Groups  
 Run Control ID: TEST\_STGRP\_POP\_SEL\_ACTIVE\_file    Report Manager    Process Monitor    Run

**Population Selection**  
 Population Selection  
 Selection Tool: External File  
 Attached File: student\_groups.csv    Upload File    Delete File    View File  
 File Mapping: MAPPING ID ONLY    **Preview Selection Results**

14. Enter the following information on the Process Student Groups page.

- **Student Group**: Code for you student group
- **Effective Date**: Generally the beginning of term for Active and the end of term for Inactive
- **Effective Status**: Active or Inactive depending on your needs

15. Click the **Save** button followed by the **Run** button.

Process Student Groups  
 Run Control ID: TEST\_STGRP\_POP\_SEL\_ACTIVE\_file    Report Manager    Process Monitor    Run

**Population Selection**  
 Population Selection  
 Selection Tool: External File    Upload File    Delete File    View File  
 Attached File: student\_groups.csv  
 File Mapping: MAPPING ID ONLY    Preview Selection Results

**Student Group Data**  
 \*Academic Institution: UFLOR University of Florida     Update Tuition Calc Required  
 \*Student Group: DOG VM - The Dog Course - self fun  
 \*Effective Date: 01/08/2018  
 \*Effective Status: Active  
 Comment:

**Student Override**  
 Student Override

Save    Notify    Add    Update/Display



16. On the Process Scheduler Request Page, click the **Ok** button to begin the process of uploading the students to the student group.

### Process Scheduler Request

User ID UFSRTEST10      Run Control ID TEST\_STGRP\_POP\_SEL\_ACTIVE\_file

---

Server Name:       Run Date:

Recurrence:       Run Time:      

Time Zone:

Process List						
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	SCC_STD_GRP	SCC_STD_GRP	Application Engine	Web	TXT	Distribution

17. Click the **Process Monitor** link to view the status of the upload.

### Process Student Groups

Run Control ID: TEST\_STGRP\_POP\_SEL\_ACTIVE\_file      Report Manager           

Process Instance: 18219

18. Once the process has completed, you will see **Success** in the Run Status column and **Posted** in the Distribution Status column.

#### View Process Request For

User ID:     Type:     Last:     1 Days   

Server:     Name:     Instance From:     Instance To:

Run Status:     Distribution Status:      Save On Refresh

Process List							Run Status	Distribution Status	Details
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time			
<input type="checkbox"/>	18219		Application Engine	SCC_STD_GRP	UFSRTEST10	11/16/2017 12:09:46PM EST	Success	Posted	Details

Go back to Process Student Groups

[Process List](#) | [Server List](#)

ADDITIONAL HELP

**Office of the University Registrar**

352-392-1374

<https://registrar.ufl.edu/>

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352-392-HELP (4357)

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## STUDENT GROUPS – VIEW STUDENT GROUPS BY STUDENT

Student Groups are any identified group to be tracked and they can also be used to manage enrollment, immunization requirement, and mandatory health insurance requirements, among other things.

Some examples of Student Groups include specific distance-learning cohorts, student veterans, preview, and students participating in a study abroad programs.

You can view all of the students within a student group using the following steps.

### NAVIGATION

11. Click [Main Menu](#)
12. Click [Student Information System](#)
13. Click [Records and Enrollment](#)
14. Click [Career and Program Information](#)
15. Click [View Student Groups by Student](#)

### VIEW STUDENT GROUPS BY STUDENT

19. On the View Student Groups by Student Page, the Academic Institution automatically populates to UFLO. Do not change this.

In the **Student Group** field, enter the student group you wish to review. You can also use the **look-up tool** (magnifying glass) to search for the student group. Then, click the **Search** button.

**View Student Groups by Student**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

**Search Criteria**

Academic Institution: = [UFLOR] [Q]

**Student Group:** = [ ] [Q]

Description: begins with [ ]

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

20. In the **Select Effective Dates** field, you can select Most Current Active, Most Current Inactive, All, or Most Current Any Status. In this example, since we are searching for the listing of Active students within an Active student group, we will select **Most Current Active**. Then, click the **Get Results** button.

**View Student Groups by Student**

Academic Institution UFLOR University of Florida Effective Date 01/01/1901

Student Group DOG VM - The Dog Course - self fun Effective Status Active

Select Effective Dates **Most Current Active** ▼

Range Selection No Range Selection ▼

**Get Results**

Name	ID	Effective Date	Effective Status	Comment	Details
					Details

Return to Search Notify

21. You will see a listing of all students in the selected student group.

**View Student Groups by Student**

Academic Institution UFLOR University of Florida Effective Date 01/01/1901

Student Group DOG VM - The Dog Course - self fun Effective Status Active

Select Effective Dates Most Current Active ▼

Range Selection No Range Selection ▼

**Get Results**

Name	ID	Effective Date	Effective Status	Comment	Details
Student 1	00000001	01/04/2017	Active		Details
Student 2	00000002	01/04/2017	Active		Details
Student 3	00000003	01/04/2017	Active		Details
Student 4	00000004	01/04/2017	Active		Details
Student 5	00000005	01/04/2017	Active		Details

Return to Search Notify

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