

Mass Add Actions in Notepad – Customize Item for Admissions

Date	Revised By	Comment
06/28/2012	Randy Jacobs	Initial Draft
08/09/2013	Randy Jacobs	Added some InfoMaker steps

Purpose: This procedure provides the steps needed to customize an Action in Notepad and add it to multiple student records at one time.

Description: Mass Add allows you to add Actions to multiple student records at one time in Notepad. The Customize Item function allows you to edit the content of the Actions before applying them to the student records.

Notepad entries (Actions) are added to multiple students' records at one time by one of the following methods:

- 1) manually creating the list of student ID numbers ,
- 2) copying a list of student ID numbers from another list such as an Excel spreadsheet, OR
- 3) running a query to select a particular group of students based on specific criteria.

Note: Unlike adding an Action to a single record, mass adding a customized Action involves *no dragging* of Actions from the Action list to the right-hand pane. If you customize an Action and also drag the Action to the right-hand pane, two actions will be created for each student on the lists: the customized Action as well as a standard Action.

Prerequisites:

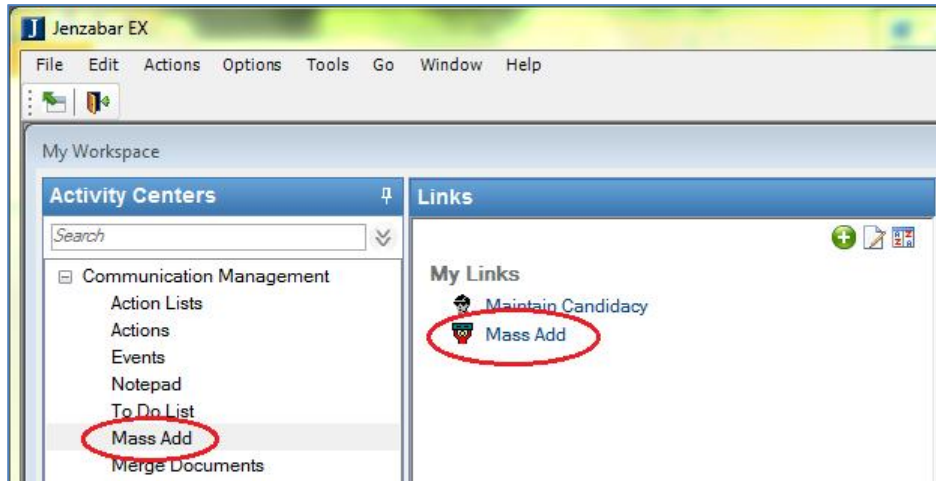
- SWU domain login account
- Access rights to Jenzabar EX
- Access rights to Admissions tables and functions within Jenzabar EX
- Access rights to Notepad functions and Mass Add functions

Procedure

1.0 Begin by opening the Mass Add module in Jenzabar EX.

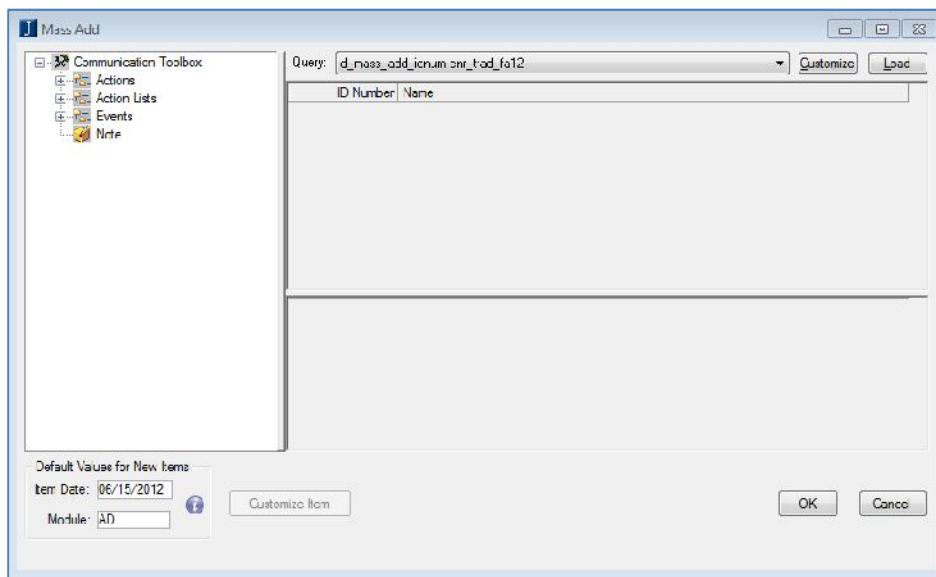
1.1 Mass Add can be found under *Communication Management* in the Activity Centers.

Figure 1



1.2 The Mass Add window will open.

Figure 2



NOTE:

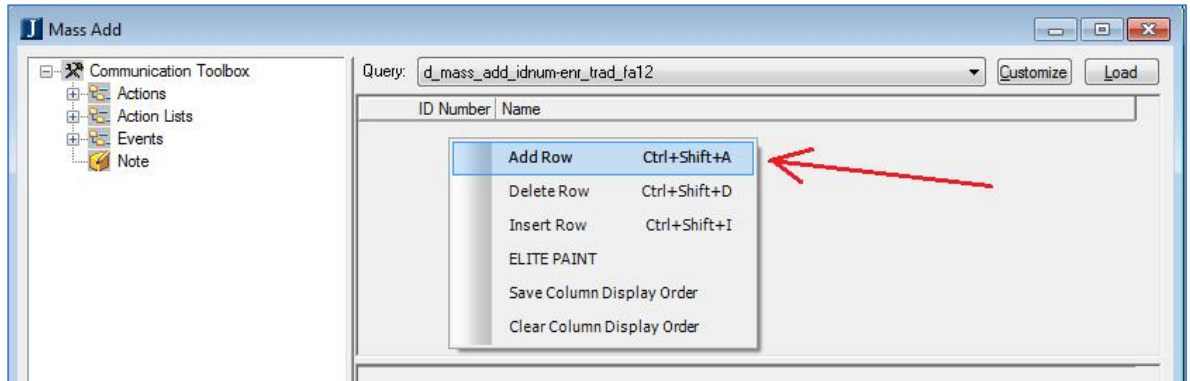
- To manually add students to the list, continue with Step 2.0.
- To use an Excel spreadsheet to add specific students to the list, skip to Step 3.0.

2.0 Manually add students to the Mass Add list.

This is useful when working with a relatively few number of students.

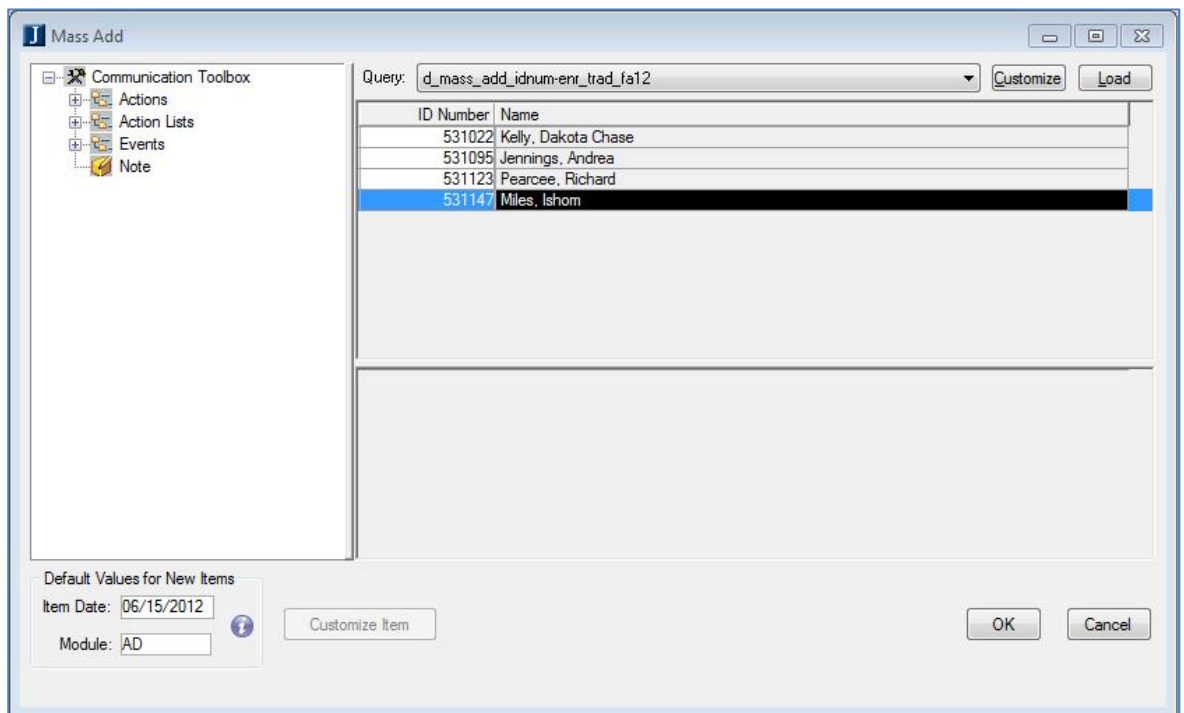
- 2.1 Right click in the right-hand pane, and select Add Row. (You can also press Ctrl+Shift+A to do this.) Repeat for additional rows.

Figure 3



- 2.2 Enter the ID number of the first student in the ID Number column.
- 2.3 Press Enter or Tab. The student’s name will appear in the Name column.
- 2.4 Repeat the previous steps to add multiple students to the list in the right pane.
(Notice that the Customize Item button is not active.)

Figure 4



- 2.5 **Skip to Step 4.0.**

3.0 Use an Excel spreadsheet and a query to add specific students to the list.

This is useful when working with a large number of students and you have the student list in an Excel spreadsheet.

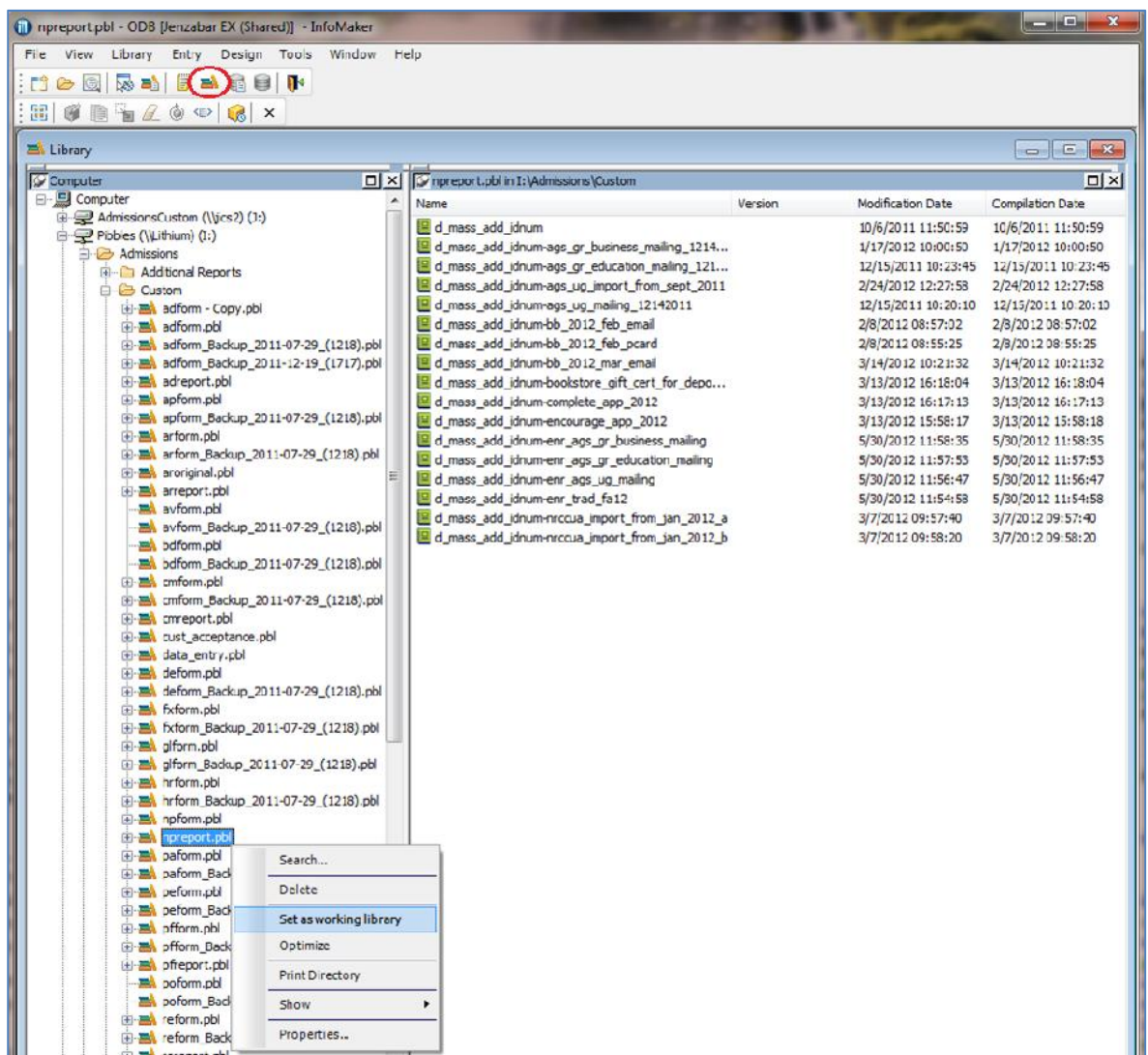
3.1 Run InfoMaker, and click the Library icon  (circled in Figure 5).

You can run InfoMaker manually, or you can select a query name from the drop-down list and click the Customize button at the top of the Mass Add window (see Figure 4).

3.2 Expand the folders to the I:\Admissions\Custom\npreport.pbl library.

3.3 Right click the npreport.pbl library and select “Set as working library”.

Figure 5

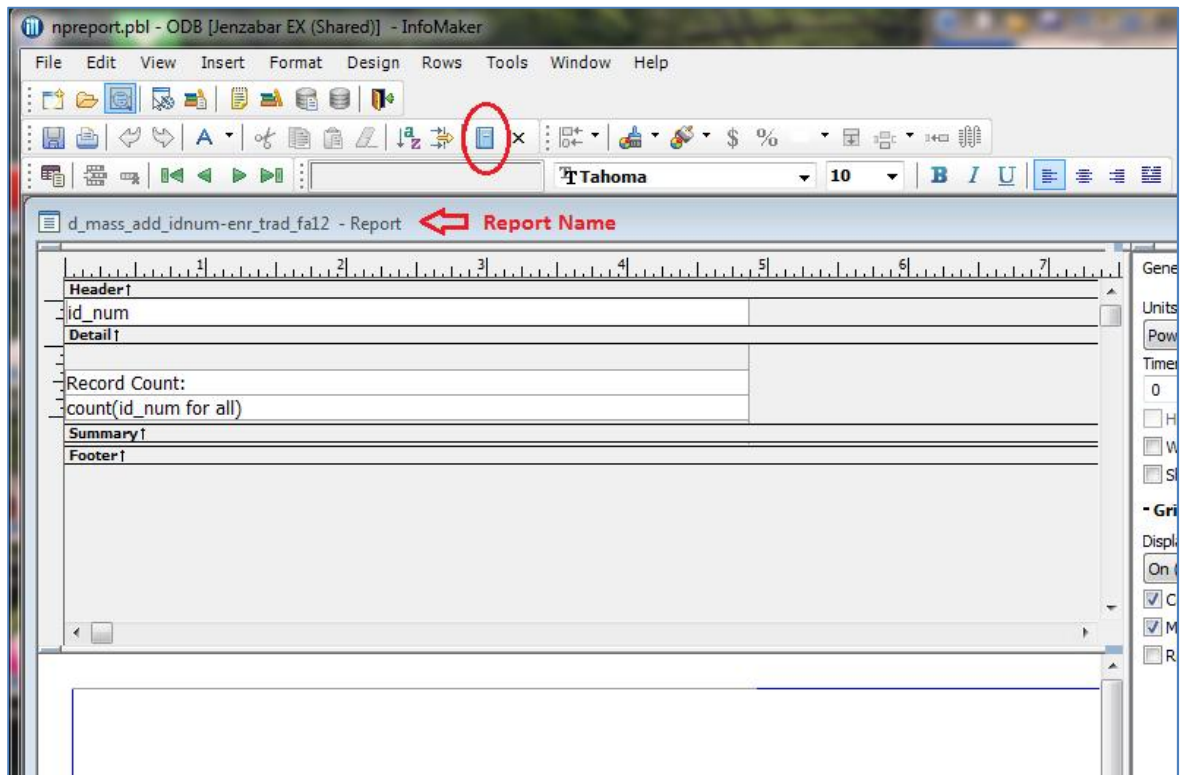


3.4 Open a report from the right-hand panel.

For a simple example, this procedure will use the “d_mass_add_idnum-enr_trad_fa12” report to generate a list of students.

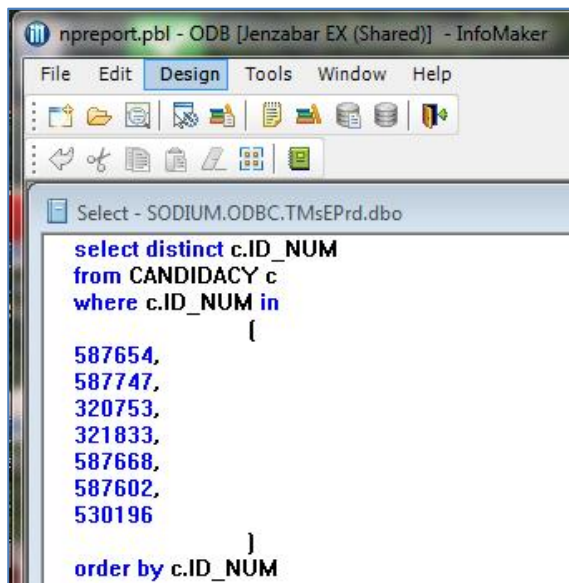
3.5 The report window will open.

Figure 6



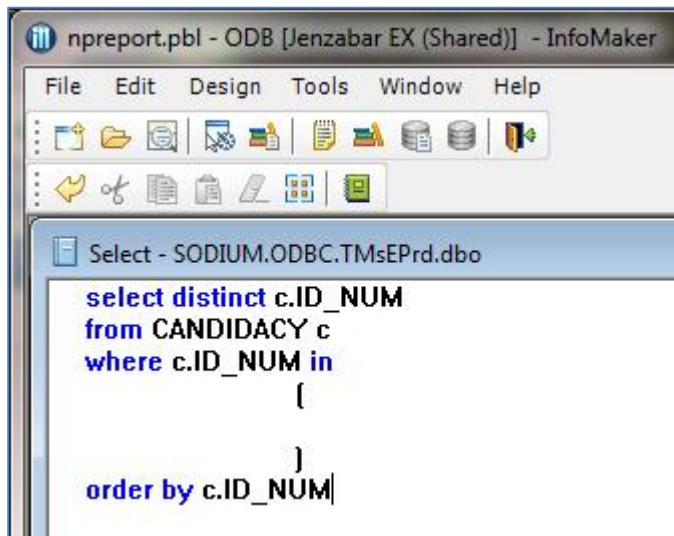
3.6 Click the blue Data Source icon (circled above in Figure 6) or select Design/Data Source from the menu to open the Data Source window. This window shows the query used to create this report the last time it was run.

Figure 7



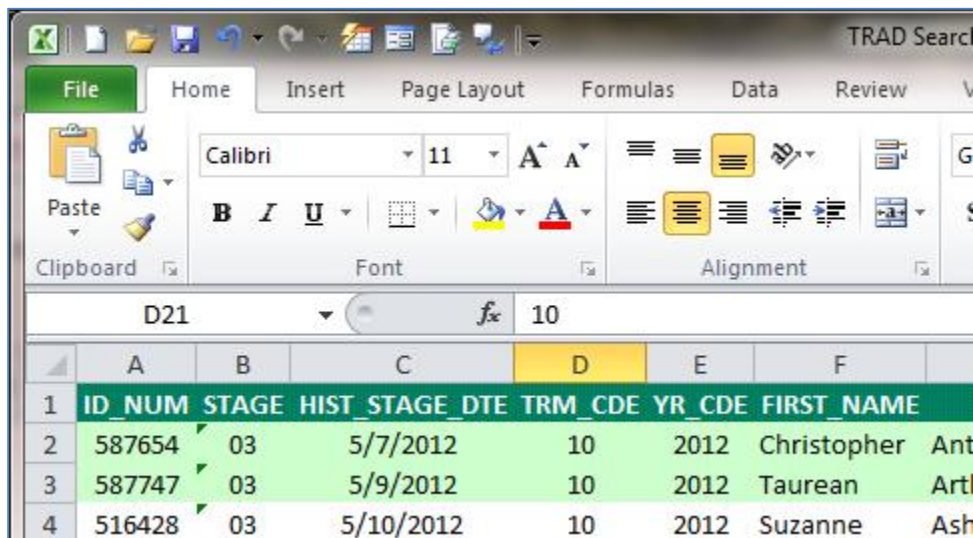
- 3.7 Delete the ID numbers from the query to ensure no confusion in the list.

Figure 8



- 3.8 Leave the InfoMaker window open so that you can paste the next list of ID numbers into the query.
- 3.9 Open the spreadsheet that contains the list of student ID numbers to be copied.

Figure 9

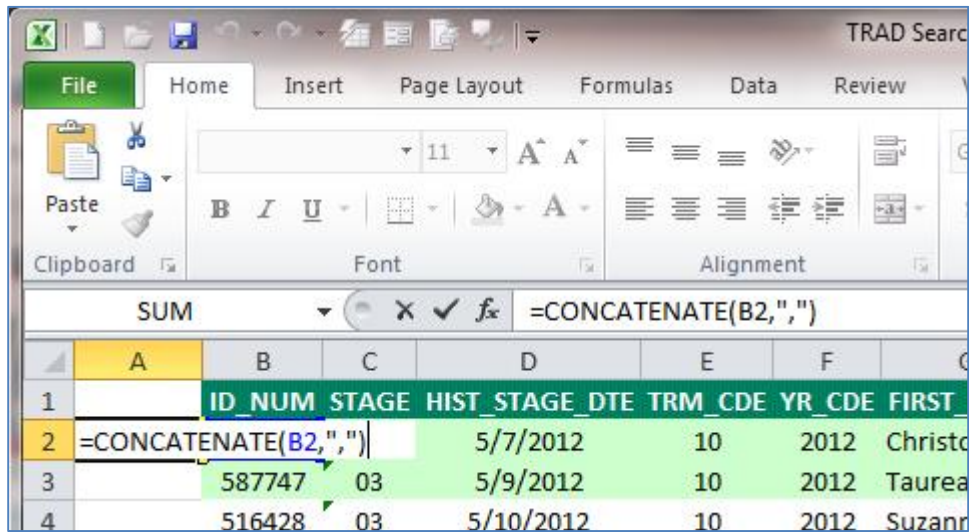


- 3.10 Insert a blank column to the left of the ID number column.

3.11 Enter the following formula into the first cell next to an ID number. In this case, cell A2:

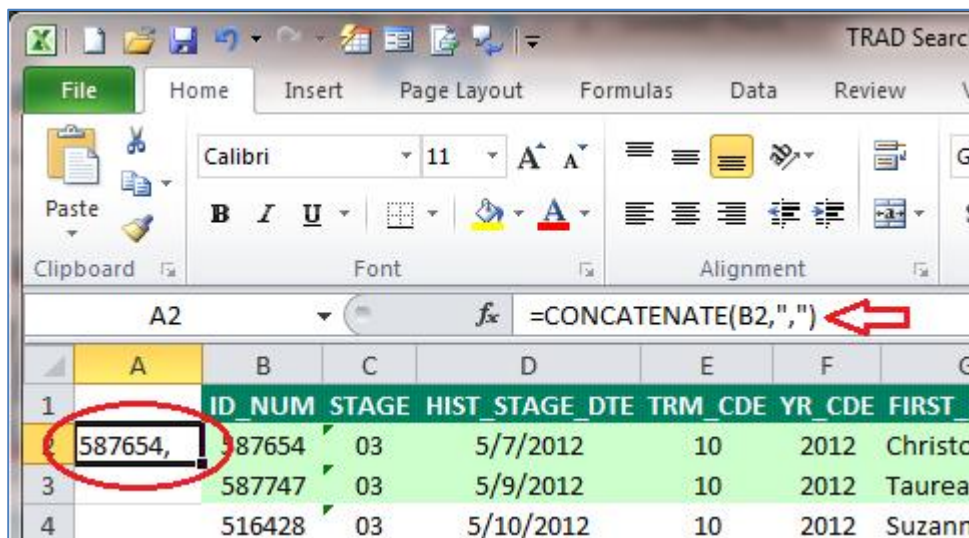
```
=CONCATENATE(B2,",")
```

Figure 10



3.12 Press Enter to complete the formula, and then click that same cell to make it active. You will now see the same ID number with a comma added to it. (See Figure 11.)

Figure 11



3.13 Copy this formula down the column so that all the ID numbers are listed in this new column.

SPEED TIP: Double-click the fill handle in the cell you are copying from (the black square in the bottom right corner of the active cell). This will copy the formula down the column as far down as the contents of the adjacent column extend.

3.14 Select and copy the cells that contain the ID numbers with the commas (see Figure 12).

Figure 12

	A	B	C
1		ID_NUM	STAGE HI
2	587654,	587654	03
3	587747,	587747	03
4	516428,	516428	03
5	587684,	587684	03
6	587762,	587762	03
7	587589,	587589	05
8	587809,	587809	05
9	587665,	587665	03

3.15 Switch back to the open InfoMaker Data Source window (query).

3.16 Paste the copied list of student ID numbers into the InfoMaker Mass Add report query.

3.17 Delete the comma that follows the last ID number in the list.

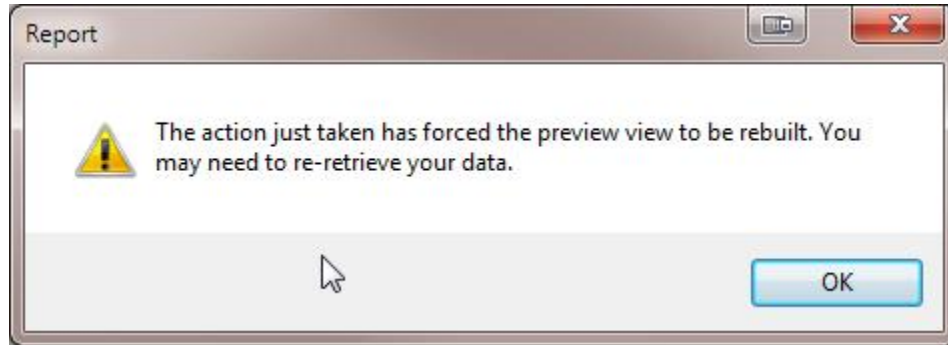
Figure 13

```

npreport.pbl - ODB [Jenzabar EX (Shared)] - InfoMaker
File Edit Design Tools Window Help
Select - SODIUM.ODBC.TMsEPrd.dbo
select distinct c.ID_NUM
from CANDIDACY c
where c.ID_NUM in
{
587654,
587747,
516428,
587684,
587762,
587589,
587809,
587665 ← Last comma deleted!
}
order by c.ID_NUM
    
```

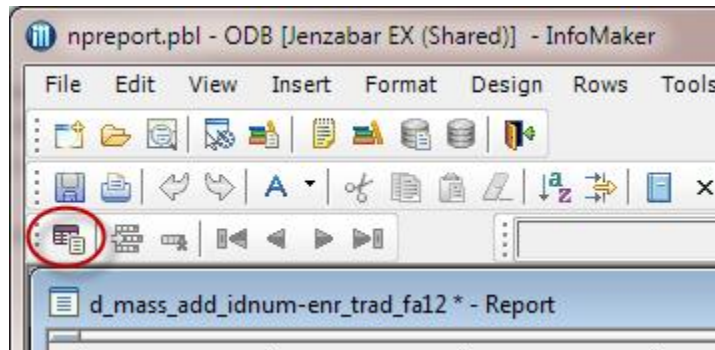

- 3.18 Click the green Return icon (circled above in Figure 13) to return to the InfoMaker report window.
- 3.19 Click OK on the following pop-up window when it appears. This message simply lets you know that your query has changed, and that you may want to retrieve the data to view it.

Figure 14



- 3.20 Retrieve the data for the InfoMaker report by clicking the “Retrieve” button (circled in Figure 15 below). This will populate the report with the student ID numbers that you listed in the Data Source query.

Figure 15



- 3.21 Verify the resulting records and Record Count to make sure you get the total number of student ID numbers that you are expecting.

NOTE: It is possible that the report count may be slightly less than what you were expecting because of duplicates in your Excel spreadsheet list. If the counts are off, check the spreadsheet for duplicates to make sure you are not missing someone from the list.

Figure 16



The screenshot shows a window with a list of student ID numbers and a record count. The numbers are: 320753, 321833, 530196, 587602, 587654, 587668, and 587747. Below the list, the text 'Record Count:' is followed by the number '7'. The 'Record Count:' and '7' are circled in red.

320753
321833
530196
587602
587654
587668
587747
Record Count: 7

- 3.22 Save the report by selecting File > Save or by clicking the blue Save button in the toolbar. You can also select File > Save As to give your report a different name.

NOTE: You must name the report properly for it to show up in the Mass Add window. The first part of the name must follow the original. In this case, the first part of the file name must be "d_mass_add_idnum-", followed by your name for the report.

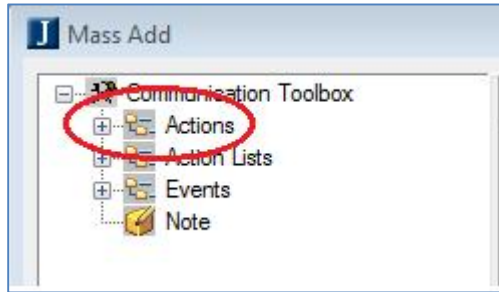
- 3.23 Close the report, and close InfoMaker.
- 3.24 **Continue to Step 4.0.**

4.0 Select an Action and customize it* for mass adding it to the list of students.

*** NOTE:** A best practice is to always add specific details to a Notepad entry.
 (For example, rather than simply adding a generic EMAIL Action with no description, add descriptive text to the entry describing the subject of the email.)

4.1 When all the students have been added to the list in the right-hand pane, click the “+” symbol next to “Actions” to expand the list of available Actions.

Figure 17



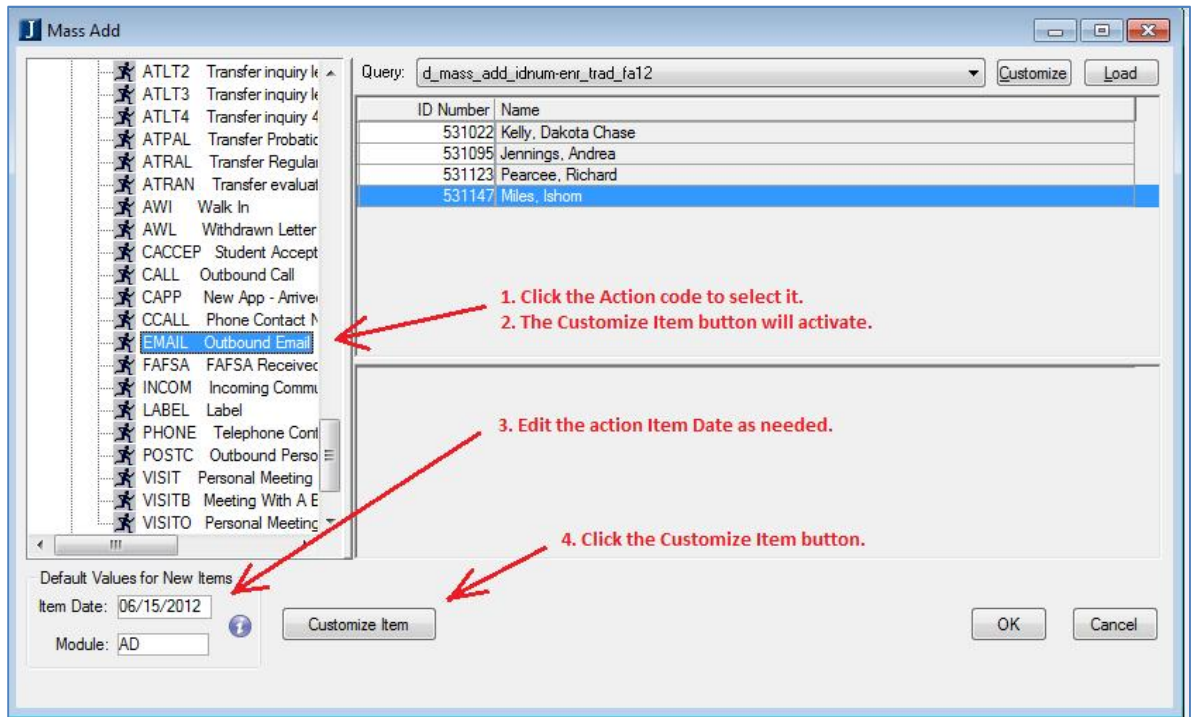
4.2 Click the appropriate Action code to select it (step 1 in Figure 18).

4.3 The Customize Item button will activate (step 2 in Figure 18).

4.4 Edit the Item Date for the item as needed (step 3 in Figure 18).

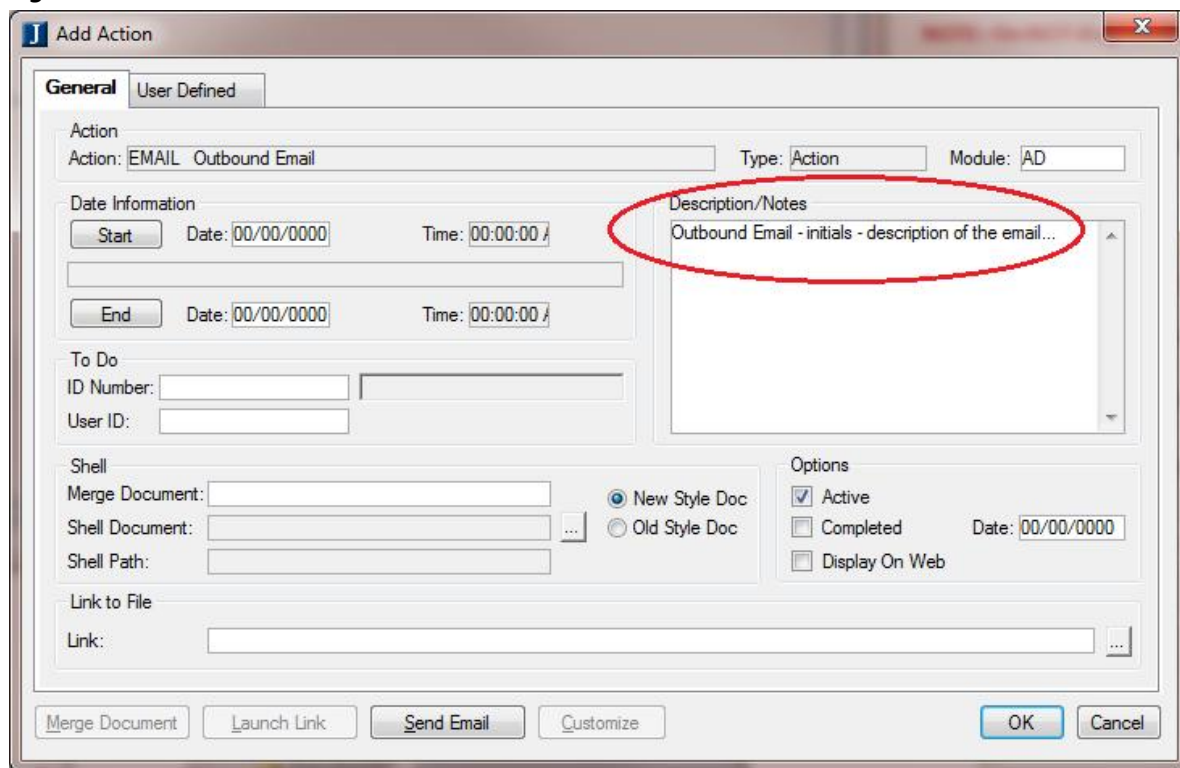
4.5 Click the Customize Item button (step 4 in Figure 18).

Figure 18



4.6 In the Add Action window, edit the details of the Action to customize it

Figure 19



4.7 When you have completed customizing the Action, click OK. **Clicking OK on this window applies the customization to the students’ records** and closes the Add Action window. *NOTE: Depending on how many students are in your list, this update can take a few minutes to run.*

4.8 You will return to the Mass Add window.

NOTE: Do NOT drag the Action to the right-hand pane!

4.9 At this point you are finished. The customized Action has been applied to the students in the list you created.

5.0 Next Steps:

- 5.1 **If you want to mass add additional Actions to this same list of students**, repeat from Step 4.0 above. Just select the new Action and repeat the process.

- 5.2 **If you want to mass add an Action to a different set of students**, click OK to close the Mass Add window, and then repeat the above steps starting with Step 1.0.

NOTE: The original list of students is not cleared out automatically; you must close the Mass Add window and reopen it to start from an empty list.

If you load a subsequent list of students from a query without first closing the Mass Add, and the second list is shorter than the first list, the students at the bottom of the original list will get the subsequent action, whether you intend for that to happen or not.

For example, if your first list contains 100 “Action A” students, and you load a list of 70 “Action B” students without closing and reopening the Mass Add window, the last 30 “Action A” students will also get Action “B” entered in their records.

--- End of Procedure ---