Office of Student Systems Services

Advising Holds Maintenance Batch Upload

This document outlines how to create a batch file of Advising Holds updates from a spreadsheet that can then be uploaded and processed into Banner.

Use College_Advising_Holds_Loader.xlsx spreadsheet

Get a list of students – UIN
Open **College_Advising_Holds_Loader.xlsx** and enter data into the appropriate field

Spreadsheet fields:
UIN - Student ID

Action Code - For student holds this value may be "U"pdate or "R"elease.

Feeder Source   - "S" indicates Student Holds feeder.

Hold Code - Always use CA for College Advising

Reason   - This is usually left blank.

Amount Owed   - Does not apply. This is only used for financial holds.

Hold Authorized By – Do not change. Always use 20CO

User-   User who placed or removed the hold. Should always be 2NSABATCH for batch processing.

Hold Start Date - The From Date of the hold. Format MMDDYYYY. This is the date the hold will be visible to the student.

Hold Release Date - The To Date of the Hold. Format MMDDYYYY. For college advising it should always be 12312099

Release Indicator - Default to "N".

Hold Reason Code - Validated against the Banner SZVHDRE validation table. CA – College Advising and DA for Departmental Advising

Columns to populate

UIN, Hold Start Date, Hold End date if different from campus end of time, and Hold Reason code are the only columns that you need to populate.

Enter data into spreadsheet – Example

UIN	Action Code	Feeder Source	Hold Code	Reason	Amount Owed	Hold Authorized By	User	Hold Start Date	Hold Release Date	Release Indicator	Hold Reason Code
999999999	U	S	CA			20CO	2NSABATCH	07202018	1212099	N	CA
888888888	U	S	CA			20CO	2NSABATCH	07202018	1212099	N	DA

Enter the UINs

Enter the Start date

Enter a different end date if needed

Enter CA for College Advising and DA for Departmental Advising

Create the batch file - Complete the spreadsheet and copy the contents of **column Y** into a text editor and save as a **.dat** file type.

Copy this column		
999999999USCA	20CO2NSABATCH	0115201812312099NCA
888888888USCA	20CO2NSABATCH	0115201812312099NDA

Copy contents of column Y into a text editor, e.g. Notepad, etc.

Your text file should look like this:

Untitled - Notepad — □ ✕

File   Edit   Format   View   Help

```
999999999USCA                    20CO2NSABATCH                  0115201812312099NCA
888888888USCA                    20CO2NSABATCH                  0115201812312099NDA
```
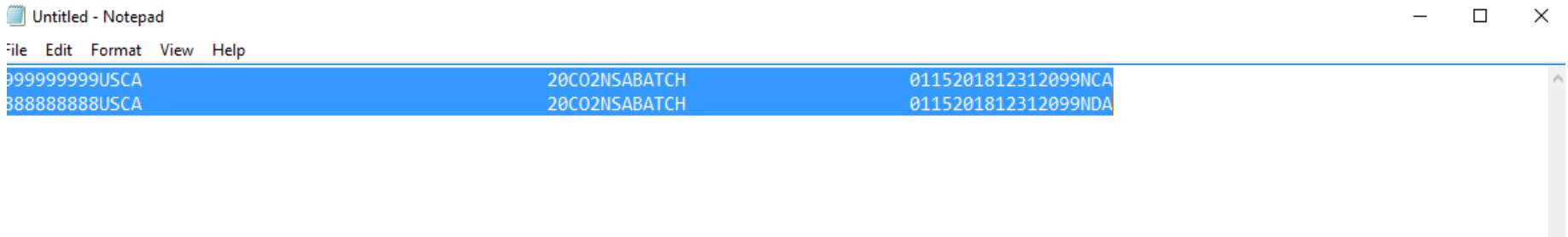
Save the file to the following naming convention:
HOLDSSH2 + **date** (YYYYMMDD) + **Time (**HHMMSS) + .dat   **NOTE:** Must be saved as a **.dat** file

Example of file name: HOLDSSH220180723170000.dat

Email the file

Email the file to Dave Elsen in Academic Enrollment Services (AES) at delsen@uic.edu and ossscoreteam@uillinois.edu .
Dave will review the file and submit it for processing.

Mobius View (View Direct) Reports

Review updates and correct any errors.
Log into Mobius View with Enterprise ID/Password to view reports - **https://mobiusview.apps.uillinois.edu/mobius/view#/**

Select the Repository Document Direct and UI2 Report and click OK

Login to Repository

Repository

Select Repository ∧

Document Direct and UI2 Report

Medical Center Reports

Loading...

Select Repository Document Direct and UI2 Report

Authentication Required ✕

? https://mobiusview.apps.uillinois.edu is requesting your username and password. The site says: "Document Direct and UI2 Report"

User Name: |

Password:

OK   Cancel

Enter User Name and Password

Welcome to Mobius View
Here is how you can get started

Browse Content

View, print, download, and perform other actions with the organization content available to you.

Take me to browse content

My Favorites

Store your frequently used content into Favorites.

Take me to my favorites

My Searches

Find the content you're looking for with quick searches, or fine-tune your results with advanced searches.

Take me to my searches

My Extraction Policies

Use a policy (template) to create a spreadsheet of data from your reports, to analyze or process further.

Take me to my extraction policies

Click on Take me to browse content

Browse
Document Direct and UI2 Report

Favorite Collect Print Download Extract

| | Jump to folder |

📁 **Reports**

📁 **CI3TT04001**
ISIS3 HISTORICAL SCHEDULED SECTION TALLY

📁 **FIINTERFAC**
Interface Error Reports

📁 **FIOPLFITD1**
FIGL ITD OPERATING LEDGER STATEMENT BY FUND-CHART 1

📁 **FIOPLFITD2**
FIGL ITD OPERATING LEDGER STATEMENT BY FUND-CHART 2

📁 **FIOPLFITD4**
FIGL ITD OPERATING LEDGER STATEMENT BY FUND-CHART 4

📁 **FIOPLFITD7**
FIGL ITD OPERATING LEDGER STATEMENT BY FUND-CHART 7

📁 **FIOPLFITD9**
FIGL ITD OPERATING LEDGER STATEMENT BY FUND-CHART 9

📁 **FOAPALRPTS**
FOAPAL HIERACHY REPORTS

📁 **HRPAYLABOR**

Click on Reports.

Browse
Document Direct and UI2 Report → Reports

Favorite Collect Print Download Extract

| | SG2 | | 200 items |

📁 **SG2BCHD01G**
BATCH HOLDS AUDIT MODE BANNER LOG REPORTS

📁 **SG2BCHD01S**
BATCH HOLDS AUDIT MODE BANNER LIS REPORTS

📁 **SG2BCHD02G**
BATCH HOLDS UPDATE MODE BANNER LOG REPORTS

📁 **SG2BCHD02S**
BATCH HOLDS UPDATE MODE BANNER LIS REPORTS

📁 **SG2CHTL01G**
COHORT LOAD LOG

📁 **SG2CHTL01S**
COHORT LOAD LIS

📁 **SG2CINC03A**
College Institution Code STVBGI Report

📁 **SG2CRHD01G**
STUDENT CURRENT HOLDS BANNER LOG REPORT

📁 **SG2CRHD01S**
STUDENT CURRENT HOLDS BANNER LIS REPORT

📁 **SG2DCBH01B**
DATA CLEANUP - BILLABLE HOURS NOT EQUAL TO CREDIT HOURS

📁 **SG2DCFH01B**
DATA CLEANUP - FRACTIONAL HOURS

📁 **SG2DCMT01B**
DATA CLEANUP - MISSING TIME STATUS

Enter in SG2 in Search

📁 **SG2DCVM01B**
DATA CLEANUP - VISA MISMATCH

📁 **SG2EGDU01J**
EXPECTED GRAD UPDATE MODE ACTIVITY REPORT

📁 **SG2EGDU02J**
EXPECTED GRAD UPDATE MODE ERROR REPORT

📁 **SG2EGDU03J**
EXPECTED GRAD UPDATE MODE CONTROL TOTAL REPORT

📁 **SG2EGT101B**
SPRING EXPECTED GRADUATION DATE

📁 **SG2EGT102B**
SPRING EXPECTED GRADUATION DATE DATA

📁 **SG2EGT501B**

📁 **SG2EGT502B**

📁 **SG2EGT801B**

Report ID's:

1. SG2SBCH02S – Batch Load Update Mode Lis Report

Review the list to make sure the holds were placed in Banner. You can also spot check the holds in Banner on SOAHOLD.