

STUDENT ACTIVITY ROSTER USER GUIDE

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Login and Authentication

Development/Test site : <https://utkapps.utk.edu/rosterimport>

Production site: <https://rosterimport.utk.edu/>

Authentication is with netid and password

To create a new roster

- Login to the website with your netid/password
- Select the term for which you will be uploading students
- Enter a short description (Ex. SSs-EAP FALL 2018)
- Enter a long description
- Click the create button

On the landing page you will see 'Create New Roster' and also a list of any open rosters you may have.

Now the roster you just created should appear under 'Your Open Rosters'.

Your Open Rosters:

ID	Term	Short Desc	Last Edit	Owner	Rows	Action
630	201840	STEF-EAP-TEST	11/29/2018 - 9:25am	workmss	0	Edit Download

To manually add individual students to the roster

- In 'Your Open Rosters' click the edit for your roster file. The next page will allow you to manually enter student id or upload a file.

Active Roster

New security measures are in place to ensure proper access to maintain student activity codes. If you are unable to see or maintain a specific activity code please contact the OIT Helpdesk at 974-9900.

Roster Term: 202020 (Spring Sem 2020)	Roster Short Desc: GDIS-TEST4	Roster Long Desc: TEST4	Update
---	---	-----------------------------------	------------------------

Created on: 01/22/2020 - 9:08am | Last updated on 01/22/2020 - 9:08am | [Delete Roster](#)

New Student: [\[upload a file\]](#)

You may insert individual student activity code records or select the [upload a file](#) option to upload a CSV file. You must select the **Banner Action** for **Add** record or **Remove** record for each student. Once the roster list is created click submit to load into Banner.

ID (NetID, StuID, or TNID)	ID Type	Activity Code	Banner Action (Add or Remove)
Enter ID #	Select...	Academic Affairs - UT-PSCC Bridge Student	Add Student's Activity Code to Banner (Default)
Sub Title (optional) (27 char max length)	Mentor NetID (optional) (8 char max length)	Add Record	

- You can manually enter a student id, id type, activity code, Banner action, sub title(optional) and mentor netid(optional) and click the add button.

ID (NetID, StuID, or TNID)	ID Type	Activity Code	Banner Action (Add or Remove)
Enter ID #	Select...	Academic Affairs - UT-PSCC Bridge Student	Add Student's Activity Code to Banner (Default)
Sub Title (optional) (27 char max length)	Mentor NetID (optional) (8 char max length)	Add Record	

Data Validation

- Verify that the person uploading has authorization to upload for the code
- Verify the student id is valid(NET ID, STUDENT ID, TN ID)
- Verify the student is enrolled for the term submitted. For Fall/Spring terms a student must be enrolled in that term. Summer is the exception for this validation rule.
- Mentor id must be a valid netid

If an error is encountered messages similar to below will appear.

✘ ERROR: No student information found for that lookup. Please verify the ID and ID Type used

✘ ERROR: Student NOT registered for term 201840.

If no errors are encountered the record should successfully be added to the roster. The roster will need to be submitted to push the students to banner.

✔ Record was successfully added to roster

To add students to a roster via a batch file

Select the 'upload a file' option as seen below.

- Next to 'Add New Record' click on 'upload a file'

Add New Record: [upload a file]



- File must be in specific CSV format containing-
 - Action - Required
 - Id – Required(NET ID, STUDENT ID, TN ID)
 - Last Name - Required
 - Activity Code - Required
 - Subtitle - Optional
 - Mentor id - Optional
- File must specify the banner action of 'A' for Add or 'D' for delete.
 - The process now allows for deletion/removal of a student activity for a term

- These are the format rules for the csv file.

To upload a file to bulk load members, the file MUST be a CSV in the format below.

Data will be linked to term 201840 and roster 'STEF-EAP-TEST'.

One row per line. Student in multiple activities must be duplicated for EACH activity.

Format:

```
student ID OR net ID,
last name,
activity_code (example format: SLPH005) [see all valid codes],
subtitle (optional - 27 character max, primarily used by Co Curricular to describe role in specific activity),
faculty mentor netID (optional - 8 character max, must be valid netID)
```

File Sample Rows:

```
000312709,SMITH,SLPH005,President
SJOHNS03,JOHNSON,SLIF025,Student Ambassador
000489851,PAPEN,SLUC005
MSAVERAGE7,SAVAGE,SLPH005,,FOUST <--- (NOTE THE ADDITIONAL COMMA IF USING MENTOR WITHOUT SUBTITLE)
```

Choose upload file:

No file selected.

- Choose browse to locate the csv file on your desktop
- Click upload file

Choose upload file:

ROSTER-SAMPLE.csv

If you do not have security access to upload data to the activity code specified in your file you will receive a message similar to this message below. If you should have access to this code you will have to

contact the Office of Enrollment management to have access added.

The following records will be inserted into roster ID 215 - 'SOR-TEST' created on 01/24/20

Items below indicate errors or warnings!

Row#	Banner Action	Student ID or NetID	Term	Activity Code	File Last Name	Banner Student (NetID)
0	A	000260308	202020	PERMISSIONS (Categories: STLIF Types: SOR, SDS) DO NOT ALLOW THIS CODE (GDIS)	000260308	Stephanie Vaden (WORKMSS)

Data Validation

- Verify that the person uploading has authorization to upload for the code
- Verify the id is valid(NET ID, STUDENT ID, TN ID)
- Verify the student is enrolled for the term submitted. For Fall/Spring terms a student must be enrolled in that term. Summer is the exception for this validation rule.

Warnings can be overlooked but indicate the record should be further reviewed to correct provided information.

Error messages will prevent a student record from loading for the term and must be corrected before you can submit the file for processing.

The following records will be inserted into roster ID 190 - 'STEF-EAP-TEST' created on 11/29/18

Items below indicate errors or warnings!

Notice: Undefined variable: nameCheckMsg in /data/www/html/banner/rosterimport/bulk.php on line 227

Row#	Student ID or NetID	Term	Activity Code	File Last Name	Banner Student Name (NetID)
1	ERROR - NOT REGISTERED FOR TERM	201840	SSS-EAP (Educational Advancement Prog)	workman	Stephanie Vaden Workman (WORKMSS)

Once the file passes the validation edits you are ready to add the students from your file to the roster. Click 'Add to Roster'

The following records will be inserted into roster ID 212 - 'GDIS-TEST2' created on 01/14/20

Items below indicate errors or warnings!

Row#	Banner Action	Student ID or NetID	Term	Activity Code	File Last Name	Banner Student Name (NetID)	SubTitle	Mentor
No errors were found. Total rows to be inserted are 10. Please click ADD TO ROSTER below to confirm:								
<input type="button" value="ADD TO ROSTER"/> <input type="button" value="CANCEL"/>								



A successful load should result in a response similar to below

✔ Record was successfully added to dataset. [Click here](#) to return to your edit screen.

This message only means that you have successfully loaded the csv student records into the roster system. YOU MUST STILL SUBMIT THE ROSTER TO PUSH THE DATA TO BANNER.

When you go to the home page you should see your file in the list of ‘Your Open Rosters’ with the appropriate number of rows/student records that were in your csv file.

Create New Roster: (All Fields Required)

You may use this form to create a new roster of students to be loaded into Banner for your specified activity codes. To create the roster you must select your term and provide a short description and optional long description then click **Create**. This will create your roster list and it should now appear in the **Your Open Rosters** section below. You must click edit for the roster to be taken to the page to upload or manually create the roster list. Once the list is created, you must return to the Home Page and click the **Submit** button for your roster data to be pushed to Banner.

New security measures are in place to ensure proper access to maintain student activity codes. If you are unable to see or maintain a specific activity code please contact the OIT Helpdesk at 974-9900.

Term	Short Desc (17 char)	Long Description (255 char)	Create
Spring Sem 2020 (202020)	Short desc	Complete description of what activities the dataset contains	

Your Open Rosters:

These rosters are open but are not yet submitted. Use the **Edit** button to update the students in the roster. The **Submit** button should be used once the roster is finalized. After the roster is submitted successfully, it will appear on the [Archived](#) page.



ID	Term	Short Desc	Last Edit	Owner	Rows	Action
212	202020 ⓘ	GDIS-TEST2 ⓘ	01/16/2020 - 2:30pm	workmss ✉	10	Edit Download Submit

How to SUBMIT your roster to push to Banner

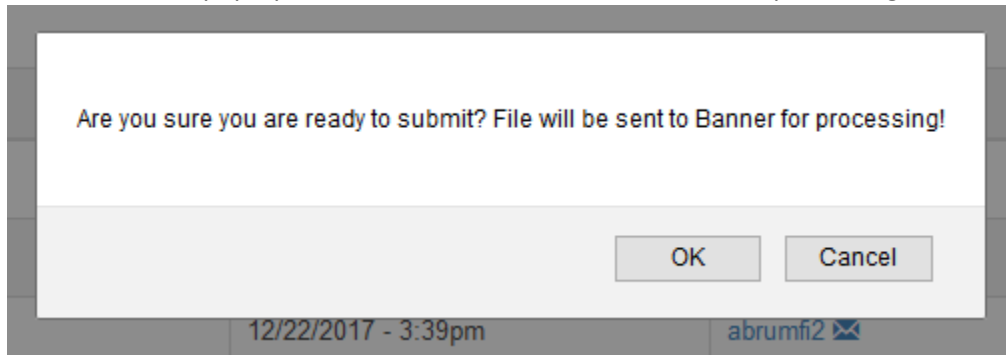
When you have successfully loaded your students into the roster tool either manually or through the batch load you can go to the home page to submit your roster to Banner.

Find your specific roster and click the 'submit' button.

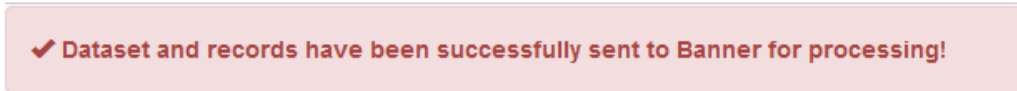
189	201840	Talley1	08/14/2018 - 11:12am	btalley2	1	Edit Download Submit
174	201730	All SGA	12/22/2017 - 3:39pm	abrumfi2	492	Edit Download Submit



Click 'ok' on the pop-up window to submit the file to banner for processing.



After clicking ok the file will be sent to banner for processing.



Now you are finished with the activity load and the student records should be updated in Banner within 1 hour.

Your roster will no longer appear under the 'Your Open Rosters' but will now appear in the 'Archived' button on the top right of the screen.

Your Archived Rosters:

These rosters that have been successfully submitted. Use the **Open** button to re-open the roster for submission. This will place the roster on the Home page.

ID	Term	Short Desc	Submitted On	Owner	Status	Rows	Action
212	202020	GDIS-TEST2	01/16/2020 - 2:33pm	workmss	Processed	10	Download Open Complete

If you need to do further adjustments to this roster, you will have two options:

- Download the file to your desktop and manipulate the file – then go through the batch load process
- Click the edit button to re-open the submitted roster and individually modify the records there then resubmit. The load process will handle duplicates, additions, or deletion/removals.

The following tables list the students that have been inserted into this roster. To cancel the addition or removal of an activity code to a student, use the **Cancel** button.

Students to Add Activity Code:

Student ID	Net ID	TN ID	Name	Activity Code	Activity Desc	Sub Title	Mentor	Banner Action	Cancel
000260308	WORKMSS	961324260	Stephanie Vaden Workman	GDIS	Disability Students ()			Add Activity Code	Cancel
00321081	KHUGHE24	971455589	Kimberly A Hughes	GDIS	Disability Students ()			Add Activity Code	Cancel
000473094	EWELLMAN	916199015	Emily Rose Wellman	GDIS	Disability Students ()			Add Activity Code	Cancel
000472929	BCANADA2	998463463	Brett Alexander Canada	GDIS	Disability Students ()			Add Activity Code	Cancel
000482471	TCALDWE9	902293304	Tyler Alan Caldwell	GDIS	Disability Students ()			Add Activity Code	Cancel
000482406	RBROCK8	977485987	Robert Caleb Brock	GDIS	Disability Students ()			Add Activity Code	Cancel
000473094	EWELLMAN	916199015	Emily Rose Wellman	GDIS	Disability Students ()			Add Activity Code	Cancel
000424580	NJACKS17	936752173	Nolan Jackson	GDIS	Disability Students ()			Add Activity Code	Cancel
000482079	ALOCKHA4	934545649	Alaina Lareece Lockhart	GDIS	Disability Students ()			Add Activity Code	Cancel
000424777	TOMLE22	930358806	Tom H Le	GDIS	Disability Students ()			Add Activity Code	Cancel

Students to Remove Activity Code:

No students to remove activity code. To remove an activity code from a student, use the 'Remove' selection in the form above.

 Submit

Need help? [Send an Email](#) | DEV Student Activity Roster System | v1.7.0

How to export student activity data

If you need to determine students in specific activity codes you can export and sort the data from the roster tool. In the upper right corner of the page click on the 'codes' button.



This will open a list of student activity codes along with description and last date updated information.

Based on your security you may have access to 'export' data for specific activity codes. If the export button is not available you do not have access to that code.

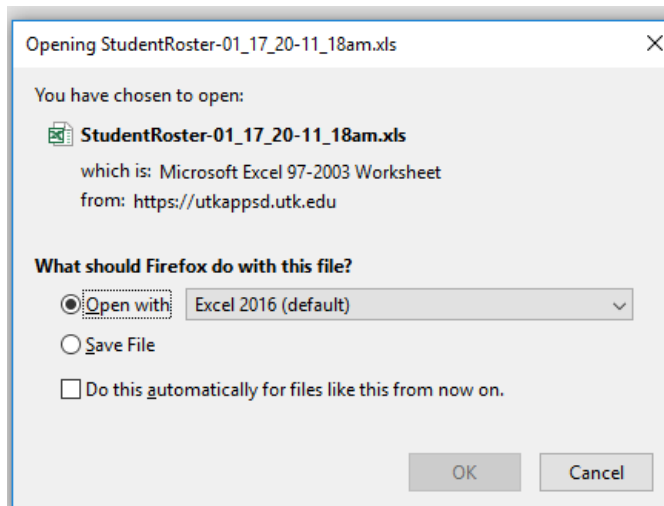
Activity Codes:

This is a list of all active activity codes. Use the **Export** button to download a spreadsheet of students assigned selected activity code.

Category	Type	Code	Description	CCT	CCT Category	Date Updated	Export
ACAF	EM	ACAF005	UT-PSCC Bridge Student	No		10-26-2016	Export
EM		EMREVTRN	Reverse Transfer	No		07-18-2017	Export
EM	REGGR	REGSDPP	SDPP 4 Payment DPP for Seniors	No			Export
GRSCH	GRSCH	600EXCEP	600-Level Exception	No		11-19-2018	Export



Clicking export will open a dialog box where you can download and save the file to your desktop.



Who do I contact for questions with the Roster load

Contact Enrollment Management(Alison Connor) for:

- Defining new student activity codes
- Assistance with maintenance of activity data after it's been pushed to Banner
- Access requests to the roster tool

Contact the Office of Information Technology for:

- Any application errors that appear while in the roster tool
- Access requests to the roster tool
- For questions or issues with Argos reporting request changes through data.utk.edu