Bulk Impromptu Upload

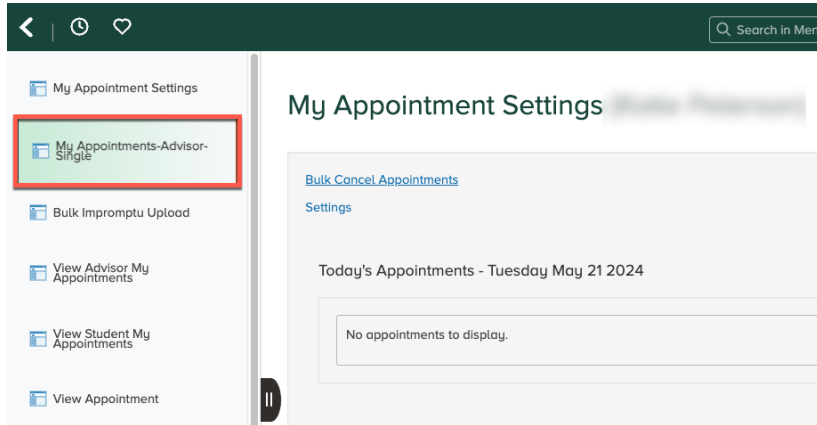STUDENT INFORMATION SYSTEM

INTRODUCTION

This job aid provides step-by-step instruction for loading impromptu appointments as a single bulk upload. Please read each step of this guide carefully to ensure a successful bulk upload.

An accompanying video tutorial can be accessed on **MSU's MediaSpace**.

For questions or concerns regarding Bulk Impromptu Upload, please contact Katie Peterson, Educational Developer for Academic Advising, at kmpeters@msu.edu.

IMPROMPTU VS. SCHEDULED APPOINTMENTS

The impromptu bulk upload process is recommended for uploading information for a large number of students at a time. For smaller lists of students, please enter the appointment information for the student individually using the Create Impromptu Appointment form, which is located under the My Appointments-Advisor-Single tab within the Advising/Tutoring Appointment System in SIS.

Impromptu appointments are also ideal for entering appointment information after the appointment has occurred. If looking to schedule a future student appointment, please direct students to the Advising/Tutoring Appointment System in SIS to select an open time slot, or you can schedule an appointment on behalf of the student through the Create Student Appointment form in SIS.
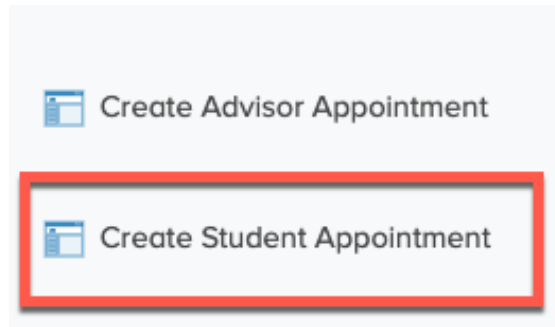
If the student is a prospective or non-MSU student, such as a student applying for readmission, please use the Guest Create Appointment option within the Advising/Tutoring Appointment System. If your department does not have a guest create appointment option and you would be interested in using this feature, please contact Katie Peterson at kmpeters@msu.edu

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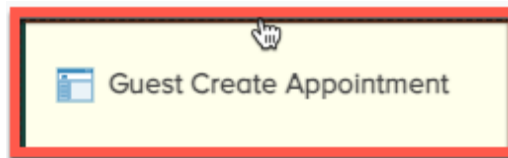
CREATING A FILE FOR UPLOAD

Before starting a bulk upload for impromptu appointments, gather the student information using the Bulk Impromptu Upload Excel file template. This file requires the following order of headings and must be saved as a **Comma Separated Values (.csv) file.**

	A	B	C	D	E	F	G	H
1	Student ID #	Advisor ID	Appointment Reason Code	Duration	Additional Information (Appt Notes)	Appointment Type	Date of Appt	Begin Time
2	188888888	199999999	0229	30	Drop-in advising	1	05/20/2024	10:00
3	188888888	199999999	0244	30	Drop-in advising	3	05/20/2024	15:00
4	188888888	199999999	0244	30	Drop-in advising	2	05/21/2024	17:00

Student ID number – Enter the student's 8-digit ID number.
- Example: 188888888
- If needing to locate this information, log into the Student Information System, select the Advisor menu and then the Student Advising tile. Enter the student's first and last name or NetID in the Campus ID space. Their Student ID number will appear at the top of the next page.

Advisor ID – Enter the advisor's 8-digit PID number.
- Example: 199999999
- If needing to locate this information, log into Student Information System, select the Advisor menu and then the Student Advising tile. Enter the advisor's first and last name or NetID in the Campus ID space. Their ID number will appear at the top of the next page.

Appointment Reason Code - Enter the 4-digit number that matches the major, minor, or program the student is being advised for.
- Example: Enter 0229 for Psychology
- This entry must include the first zero to maintain a 4-digit number. Change the format of the cell to Text if the zero disappears.

Duration – Length of the appointment and is typically a 2-3-digit number.
- Example: 30, 60, or 120

Additional Information (Appt Notes) – Provide any notes regarding the appointment in this space.
- Example: Drop-in advising appointment to discuss scheduling concerns.

Appointment Type – Enter in a single digit that aligns with how the impromptu appointment was conducted: Impromptu Zoom (1), Impromptu Phone (2), Impromptu Email (3), or Impromptu In-Person (4)
- Example: Enter only the number 1 if the impromptu appointment was conducted on Zoom.

Date of Appt – Enter the date in which the appointment occurred. This must include a 2-digit month, 2-digit day, and 4-digit year and include slashes (MM/DD/YYYY).
- Example: 05/20/2024
- Change the format of the cell to Text if the zero disappears.

Begin Time – Enter the time in which the appointment began. This must include a 2-digit hour and 2-digit minute (HH:MM). This space also follows military time, do not include AM or PM in the cell and instead write 13:00 for 1:00PM, 14:00 for 2:00PM, etc.
- Example: 09:00 or 15:00
- Change the format of the cell to Text if the zero disappears.

TIP: If meeting with many students for either drop-in advising or group advising, it is recommended to track all this information on this Excel file as students are checked-in for easy upload later.
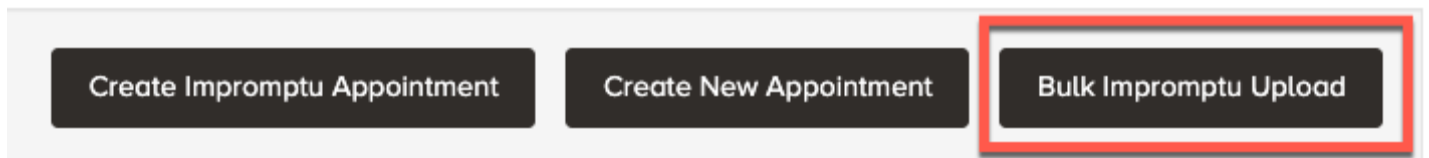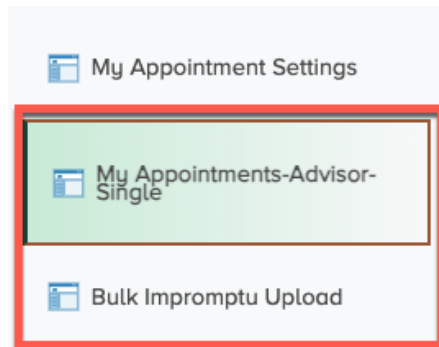
BULK IMPROMPTU UPLOAD STEPS

LOCATING BULK IMPROMPTU UPLOAD OPTIONS

1. Log into the Student Information System, select the **Advisor** menu from the top left, and then select the **Advising/Tutoring Appointments** tile:
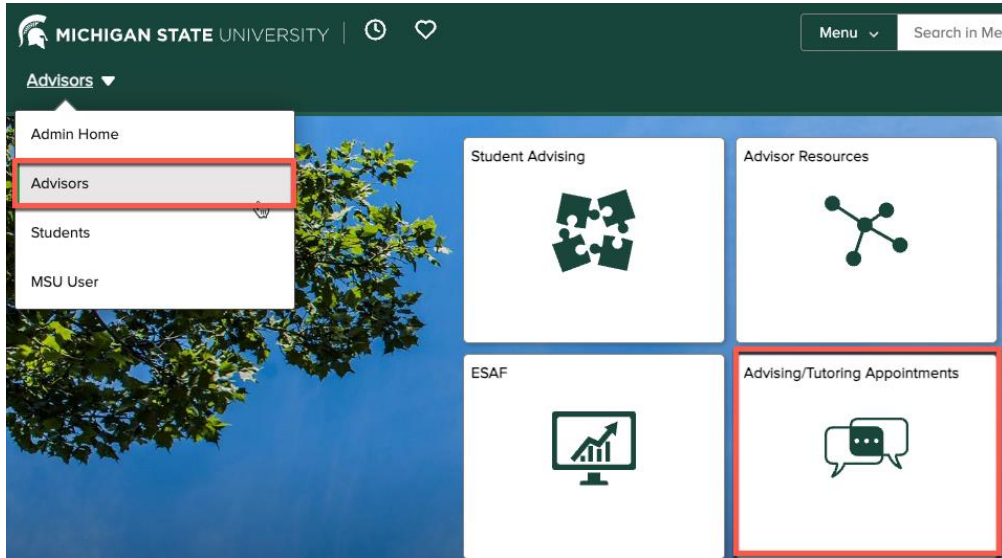
2. The Bulk Impromptu Upload option is in two places: on the left menu and within the My Appointments-Advisor-Single page. Select either option to be directed to the Bulk Impromptu Upload page:

BULK IMPROMPTU UPLOAD STEPS

CREATE A NEW RUN CONTROL ID

1. In this initial step, users will see a Search by Run Control ID page. For first time users of the Bulk Impromptu Upload process, a new Run Control ID must be created.

2. Select **Add a New Value** to begin:

3. On the next page, enter a name for the Run Control ID and do not include spaces. Example: **impromptuupload**.

    A. After this step, you can reuse the same Run Control ID for future uploads. You have the option of creating new Run Control IDs in the future but is not necessary for every new upload.

4. Select the **Add** button to create the new Run Control ID.

BULK IMPROMPTU UPLOAD STEPS

LOAD IMPROMPTU APPOINTMENTS

1. After creating a new Run Control ID, you will be taken to the Load Impromptu Appointments page.

2. First, click on **Add Attachment** and select the .csv file that contains the list of impromptu appointments. Please see page 3 of this guide for instructions on entering student information into a .csv file for successful upload.
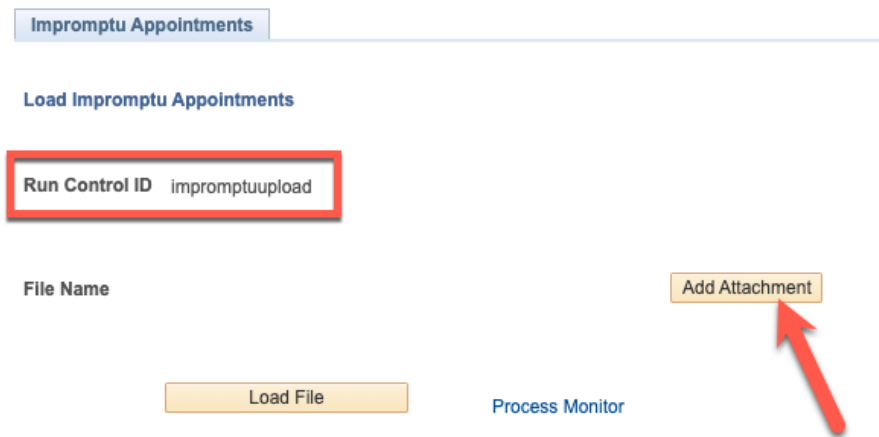
3. Once the file has been selected, click the **Upload** button.
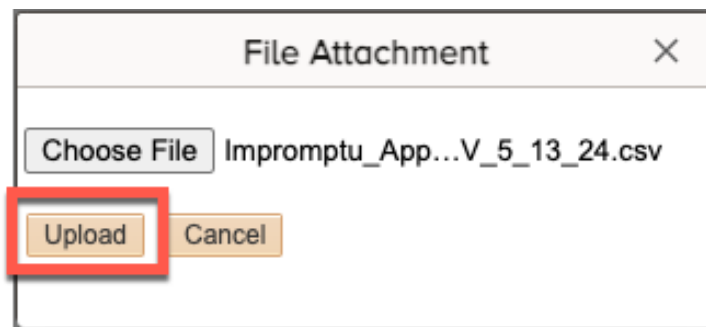
BULK IMPROMPTU UPLOAD STEPS

LOAD IMPROMPTU APPOINTMENTS (CONTINUED)

4. The selected .csv file will appear next to the File Name heading. Click on the **Load File** button to begin the upload.
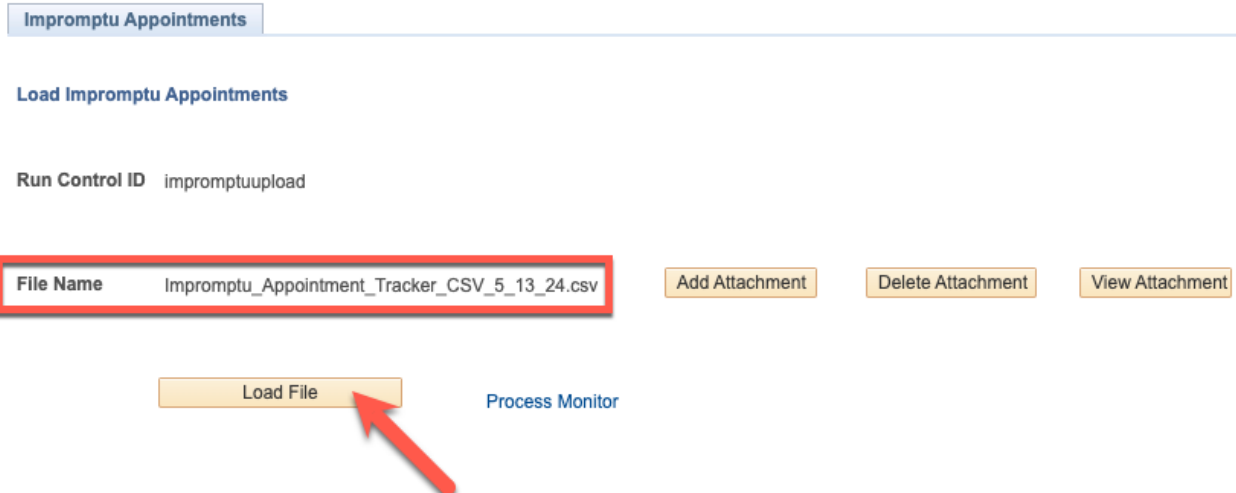
5. A box will appear noting that the request was successfully submitted. This does not mean, however, that the upload was successful. Select **OK** to close the box.
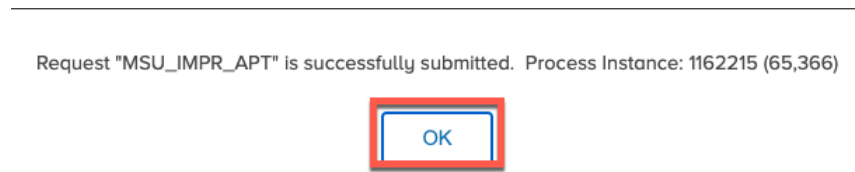
6. Click on the **Process Monitor** button, located next to Load File, to view the status of your upload:
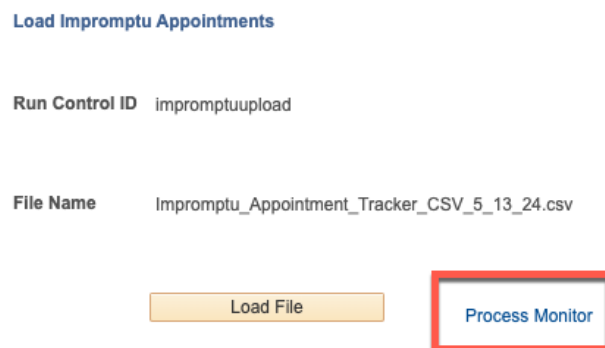
BULK IMPROMPTU UPLOAD STEPS

LOAD IMPROMPTU APPOINTMENTS (CONTINUED)

7. On the Process Monitor box, locate the most recent file upload by Run Date/Time. Look for the **Run Status** and **Distribution Status** headings for information on your upload.

- The Run Status heading will initially appear as Queued. Select the **Refresh** button until this changes to *Success*. If the heading reads *No Success*, the upload did not occur, and you will need to review your file for any errors.

- Under Distribution Status, this heading should show as *Posted* to confirm that the the appointment data was successfully uploaded. If this appears as *Not Posted*, the file upload was not successful, and the file should be reviewed again.

- Once complete, select OK to close the Process Monitor box.

FUTURE BULK IMPROMPTU UPLOAD

1. When processing future bulk impromptu uploads, select Bulk Impromptu Upload button from the left menu or within the My Appointments-Advisor-Single tab.

2. To locate the previously created Run Control ID, select the **Search** button just beneath the Search by heading. Previously created Run Control IDs will populate towards the bottom of the screen. Click on the preferred Run Control ID to begin the upload process.

FUTURE BULK IMPROMPTU UPLOAD

3. You can create a new Run Control ID at any time, though not required. If looking to create a new Run Control ID, select the Add a New Value at the top right and follow the steps provided on page 5.

Bulk Impromptu Upload

Find an Existing Value

⊕ Add a New Value

▼ **Search Criteria**

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

🕘 Recent Searches [Choose from recent searches ▾] ✎   🔖 Saved Searches [Choose from saved searches ▾] ✎

Search by: Run Control ID begins with [   ]
            ⌄ Show more options

[Search]   [Clear]

CHECK STUDENT DATA

To test if the file was uploaded correctly, select a few student ID numbers from the file and then go to the **View Appointment** tab within the Advising/Tutoring Appointment System.

Enter the student's ID number next to the ID field and then select the Search button.

The student's appointments will populate at the bottom of the screen. Search for the day and time of the appointment that matches the information listed in the file to confirm the upload was successful.