# Using the Population Selection Process

## Understanding the Population Selection Group Box

A standard group box appears on run control pages for processes that use the Population Selection process to select the IDs to process. The Population Selection process may be required for some processes (for example, the Mass Assign Service Indicators process) but optional for others (for example, the 3C Engine process). The Population Selection Context Definition for a process controls whether the Population Selection process is available and if is required or optional.

If your institution defines a context definition that makes the Population Selection process available, the run control page for that process includes a standardized Population Selection group box. If the Population Selection process is available but optional, the run control page includes a check box that users can either select or clear to enable or disable the use of the Population Selection process. Depending on the page design, the check box, if it appears, might or might not be within the standard group box.

For the Mass Assign Service Indicators process, which is used in this section as an example of a process configured to use population selection, the group box appears at the top of the run control page. Because population selection is mandatory, the check box does not appear.

This section discusses the fields, links, and buttons that behave the same in the standard population selection group box wherever it appears on run control pages throughout PeopleSoft Campus Solutions. The values and parameters that you enter are specific to the application process. Consult the appropriate PeopleSoft documentation for information about using population selection for a specific application process.

This table lists the application processes that, as of the date of this publication, are configured to use the Population Selection utility.

| ***Application Process*** | ***Reference*** |
|---|---|
| Audience Criteria | See "Setting Up Audience Criteria" (PeopleSoft Campus Solutions 9.2: Contributor Relations). |
| Advisement Report | See "Producing an Online Academic Advisement Transcript Report" (PeopleSoft Campus Solutions 9.2: Academic Advisement). |
| Application Delete by Batch | See "Selecting a Group of Applications to Delete" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions). |
| Prospect Delete by Batch | See "Selecting a Group of Prospect Records to Delete" (PeopleSoft Campus Solutions 9.2: Recruiting and Admissions). |
| 3C Engine | See Running the 3C Engine Process. |

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| *Application Process* | *Reference* |
|---|---|
| Mass User Security Replacement | See "Replacing User Security for Multiple Individuals" (PeopleSoft Campus Solutions 9.2: Application Fundamentals). |
| Population Update | See Running the Population Update Process. |
| Process Student Groups | See Running the Student Group Process. |
| Service Indicator Person Mass Assign and Service Indicator Organization Mass Assign | See Mass Assigning Service Indicators. |
| Service Indicator Person Mass Release and Service Indicator Organization Mass Release | See Mass Releasing Service Indicators. |
| Aid Year Activate | See "Activating an Aid Year for a Student" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| Mass Packaging Select | See "Performing Mass Packaging Using Application Data" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| Select Students for Need Summary Validation | See "Selecting Students for Need Summary Validation" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| Select Students for Repackaging | See "Selecting Students for Repackaging" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| Process Satisfactory Academic Progress (SAP) | See "Running the SAP Batch Process" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| SF External Award Feed | See "Receiving Student Financials Payments as External Awards" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| Mass Contract Select | See "Processing Mass Contract Assignments" (PeopleSoft Campus Solutions 9.2: Student Financials). |
| Process Transcripts and Batch Transcript Request | See "Processing Batch Transcripts (Application Engine)" (PeopleSoft Campus Solutions 9.2: Student Records). |
| Process User Edit Messages | See "Assigning User Edit Messages in Batch" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| Ability to Benefit | See "Managing Ability to Benefit" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| NSLDS Request | See "Generating Financial Aid History or Transfer Student Monitoring Inform File Requests" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| NSLDS Data Push | See "Using the NSLDS Data Push Process" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| Mass Select Transactions | See Understanding the Population Selection Group Box. |
| Mass Assign Student Waivers | See "Assigning Waivers for Multiple Students" (PeopleSoft Campus Solutions 9.2: Student Financials). |


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| *Application Process* | *Reference* |
|---|---|
| Create Project Records | See "Creating Student Academic Projects in Batch" (PeopleSoft Campus Solutions 9.2: Student Records). |
| Create and Maintain Evaluations | See Processing Evaluations in Batch. |
| CR Workset Build | See "Working with Worksets" (PeopleSoft Campus Solutions 9.2: Contributor Relations). |
| Process Loan Dates | See "Updating Loan Dates" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| Pell Payment Origination | See "Creating Pell Origination Records" (PeopleSoft Campus Solutions 9.2: Financial Aid). |
| Loan Origination | See "Originating Direct Loans and Viewing Loan Status Summary Information" (PeopleSoft Campus Solutions 9.2: Financial Aid). |

# Using the Population Selection Process

This section lists the pages used for implementing the population selection process and provides an example.

## Pages Used for the Population Selection Process

**Note:** You access the pages listed here from the standard Population Selection group box, wherever it exists in the database. You will use other pages depending on the values and parameters that you enter for a specific process. Those pages are documented where the specific run control page for that business process is documented.

| *Page Name* | *Definition Name* | *Navigation* | *Usage* |
|---|---|---|---|
| Equation Editor | EQUATION_EDITOR | Click the Create Equation or Edit Equation link in the Population Selection group box on a run control page when the selection tool is *Equation Engine.* The Create Equation and Edit Equation links only appear if the user has appropriate security for creating or editing equations and the selection tool is Equation Engine. | Create a new equation or edit the selected equation to use for a process. |

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| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Equation Parameters | SCC_EQTN_POP_PARM | Click the Edit Prompts link in the Population Selection group box on a run control page when the selection tool is *Equation Engine.* The Edit Prompts link appears only if the equation is set to use prompts. | View or enter prompts for an equation.<br><br>See "Preparing to Write Equations" (PeopleSoft Campus Solutions 9.2: Application Fundamentals). |
| Query Manager | QRY_SELECT | Click the Launch Query Manager link in the Population Selection group box on a run control page when the tool is PS Query.<br><br>Reporting Tools, Query Manager | If you have security access to Query Manager, create a new query or edit the selected query to use for a process. |
| Preview Selection Results | SCCPS_RESULTS | Click the Preview Selection Results link in the Population Selection group box on a run control page. The Preview Selection Results link appears only if preview functionality is enabled on the Selection Tool page for the tool selected. | Preview the results that will be returned by the tool. |
| Population Selection File Mapping | SCCFP_PS_FILE | Set Up SACR, System Administration, Utilities, File Parser, Population Selection File Map<br><br>Click the Create File Mapping link or Edit File Mapping link in the Population Selection group box on a run control page when the tool is external file. | Create or edit a mapping for an external file for use by the Population Selection process. |

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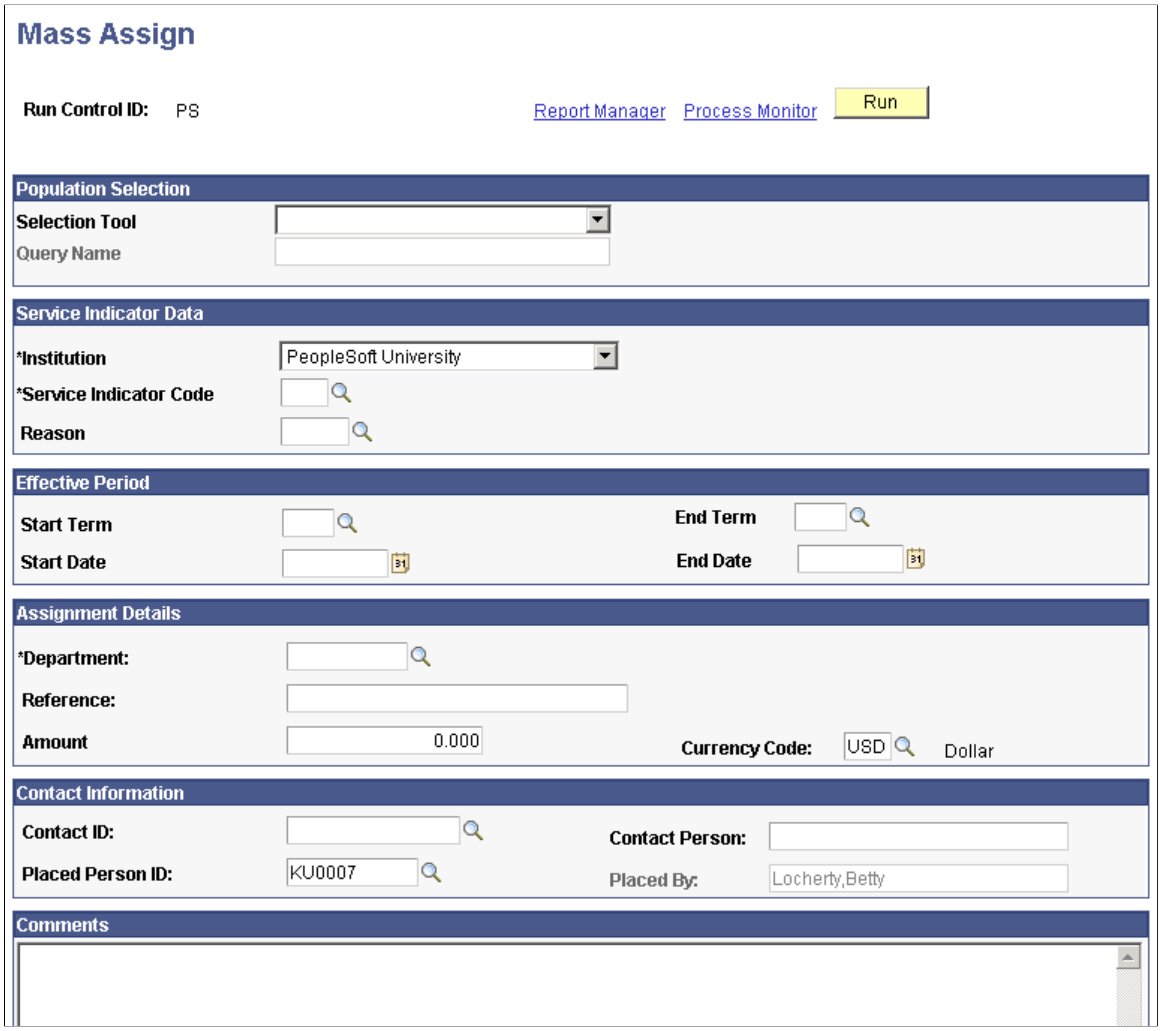
# Example: Using Population Selection

Access the run control page for the specific process, for example, the Mass Assign service indicators process (Campus Community, Service Indicators, Person, Mass Assign).

**Image: Example of the standard Population Selection group box on a Campus Solutions page**

This example illustrates the fields and controls on the Example of the standard Population Selection group box on a Campus Solutions page. You can find definitions for the fields and controls later on this page.




## Population Selection

**Selection Tool**

Select the tool to use to identify the population for the process.

Only tools set to *Active* on the Selection Tool setup page and the applicable selection tools defined in the context definition for the process are available in this drop-down list box.

The PeopleSoft system delivers the following tools with a default status of *Active: Equation Engine, External File,* and *PS Query.* If your institution creates other tools, sets them to active status, and lists them in the context definition for a

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specific process, then they also will be available in this drop-down list box.

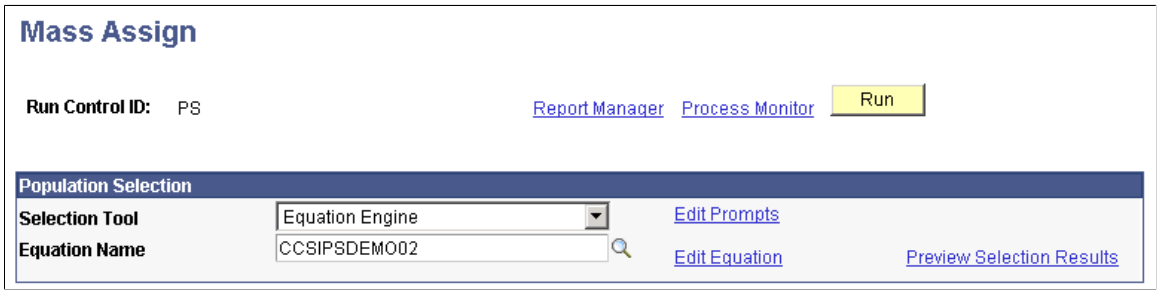
Fields and links appear on the subpage based on the tool that you select.

## Equation Engine Tool

This section describes the fields and links that appear when you select the *Equation Engine* tool in the Population Selection group box on a page.

**Image: Example of the Population Selection group box with the Equation Engine tool selected**

This example illustrates the fields and controls on the Example of the Population Selection group box with the Equation Engine tool selected. You can find definitions for the fields and controls later on this page.




When you select the *Equation Engine* tool, if you have the appropriate security for creating equations a Create Equation link appears next to the Equation Name field. If you must create an equation, you can click this link to launch Equation Editor in a separate window, where you can create the equation, save it, and then enter the equation name in the Equation Name field without exiting the page that contains the Population Selection group box.

If you have the appropriate security to create and edit equations, when you enter an equation name the Create Equation link will change to the Edit Equation link. You can click the Edit Equation link to open the Equation Editor page for that equation and edit it.

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**Note:** If you save the page with an equation name entered in the Population Selection group box and you subsequently edit and save that equation in Equation Editor, then you do not have to save the page that contains the group box again to benefit from changes to the equation.

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**Selection Tool**

Displays the type of tool that you selected. In this example, *Equation Engine* was selected.

**Equation Name**

Select the equation to use.

Only equations valid for the specific process are available. Limiting the prompt list to valid equations ensures that users select IDs with the appropriate data needed for running the process. Valid equations include the application prompt name that is set on the Equation To Context Mapping page.

The PeopleSoft system delivers predefined equations for specific processes. A list of equations delivered as of the


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date of this publication is provided as an appendix to this documentation.

See Equations for Population Selection.

**Create Equation**

This link appears only if you have security access to create new equations and if no equation name is entered.

Click this link to launch Equation Editor in a new window, where you can create a new equation.

***Warning!*** Never modify and save a delivered equation using the original equation name. The PeopleSoft system delivers predefined equations upon which specific processes depend. If you want to create a different version of a delivered equation, save it using a different name and then modify it.

**Edit Prompts**

This link appears after you enter the equation name and only if the equation that you selected is set to use prompts.

Click this link to access the Equation Parameters page, where you can view or enter prompts for the equation.

**Edit Equation**

This link appears only if you have appropriate security for editing existing equations.

Click this link to launch Equation Editor in a new window, where you can view and edit the specified equation.

**Preview Selection Results**

This link appears only if the Enable Preview Results check box is selected on the Selection Tool page for the Equation Engine.

Click this link to preview results based on the parameters that you selected before you run the process.

## PS Query Tool

This section describes the fields and links that appear when you select the *PS Query* tool in the Population Selection group box on a page.

**Image: Example of the Population Selection group box with the PS Query tool selected**

This example illustrates the fields and controls on the Example of the Population Selection group box with the PS Query tool selected. You can find definitions for the fields and controls later on this page.

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**Selection Tool**

Displays the type of tool you selected. In this example, the *PS Query* tool was selected.

**Query Name**

Select the query to use.

Only queries valid for the specific process are available. Limiting the prompt list to valid queries ensures that users select IDs with the appropriate data needed for running the process. Valid queries use a data source record listed in the context definition.

The PeopleSoft system delivers predefined equations for specific processes. A list of equations delivered as of the date of this publication is provided as an appendix in this documentation.

**Edit Prompts**

This link appears after you enter the query name and only if the query that you selected is set to use prompts.

Click this link to access the Query Prompts page, where you can view or enter prompts for the specified query.

See Creating Valid PeopleSoft Queries and Application Classes.

**Launch Query Manager**

This link appears only if you have the appropriate security for accessing the Query Manager component.

Click this link to launch Query Manager in a separate window, where you can create or update a query without exiting the Population Selection subpage.

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***Warning!*** Never modify and save a delivered query using the original query name. The PeopleSoft system delivers predefined queries upon which specific processes depend. If you want to create a different version of a delivered query, save it using a different name and then modify it.

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See *PeopleTools: Query*

**Preview Selection Results**

This link appears only if the Enable Preview Results check box is selected on the Selection Tool page for the PS Query tool.

Click this link to preview results based on the parameters that you selected before you run the process.


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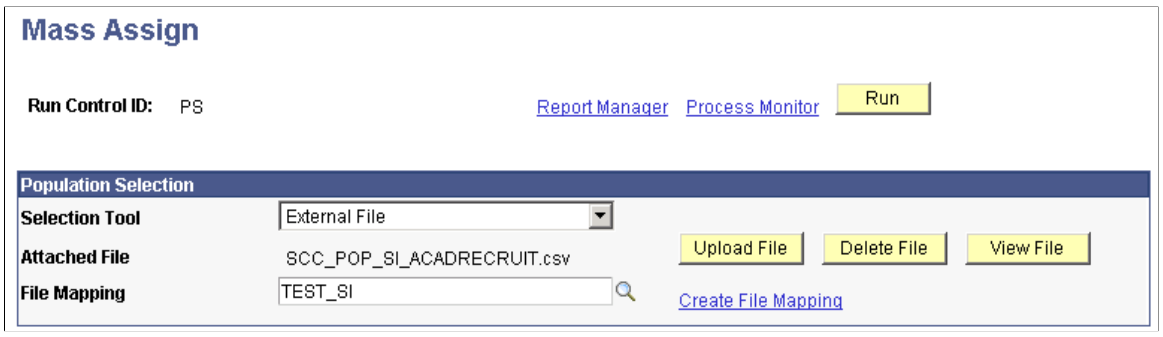
## External File Tool

This section describes the fields and links that appear when you select the *External File* tool in the Population Selection group box on a page.

**Image: Example of the Population Selection group box with the External File tool selected**

This example illustrates the fields and controls on the Example of the Population Selection group box with the External File tool selected. You can find definitions for the fields and controls later on this page.




Depending on how your institution sets up the external file tool for population selection, you will be required to upload a file as an attachment or you will be required to provide a path to a file. If you upload a file as an attachment, your system will be set up to locate the attachment where the application server and Process Scheduler can access it. If you provide a path, you must be sure to provide a path that the server and Process Scheduler can access.

The example used in this section requires an uploaded file to attach.

**Selection Tool**

Displays the type of tool selected. In this example, *External File* was selected.

**Upload File**

This button appears only after you select the *External File* tool.

Click to browse to an existing file to upload. The file can be stored anywhere; however, it must be either a delimited file or a flat (fixed length) file that is compatible with PeopleSoft File Parser.

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**Note:** Proprietary file formats such as Microsoft Excel, Microsoft Word, and Lotus Software's Lotus 1-2-3 are not supported by File Parser. An Excel spreadsheet, for example, would need to be saved as a comma separated value (.csv) file format.

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When you upload a file, the system places the file in a path accessible to the applications server and Process Scheduler, and attaches the file to the process.

See Understanding the File Parser Process.

**Attached File**

Displays the name of the uploaded and attached file.

**Delete File** and **View File**

These buttons appear only after you upload a file.

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| | |
|---|---|
| | Click View File to view the uploaded file and verify that its contents are mapped correctly for parsing.<br><br>Click Delete File to delete the uploaded file from the attachment path. |
| **Create File Mapping** | Click to access the Population Selection File Mapping page, where you can map the uploaded file for use with the Population Selection process. |
| **Edit File Mapping** | This link appears only after you upload a file and create or select the file mapping.<br><br>Click to access the Population Selection File Mapping page, where you can view or edit the mapping created for the uploaded file. |
| **Preview Selection Results** | This link appears only if the Enable Preview Resultscheck box is selected on the Selection Tool page for the External File tool.<br><br>Click this link to preview results based on the parameters that you selected before you run the process.<br><br>***Warning!*** When using an external file selection tool, always preview the results to verify that the contents of your file are mapped correctly for parsing. If you don't verify the mapping, you could have misplaced columns—for example, the column labelled Institution could contain values for the names of the IDs. |


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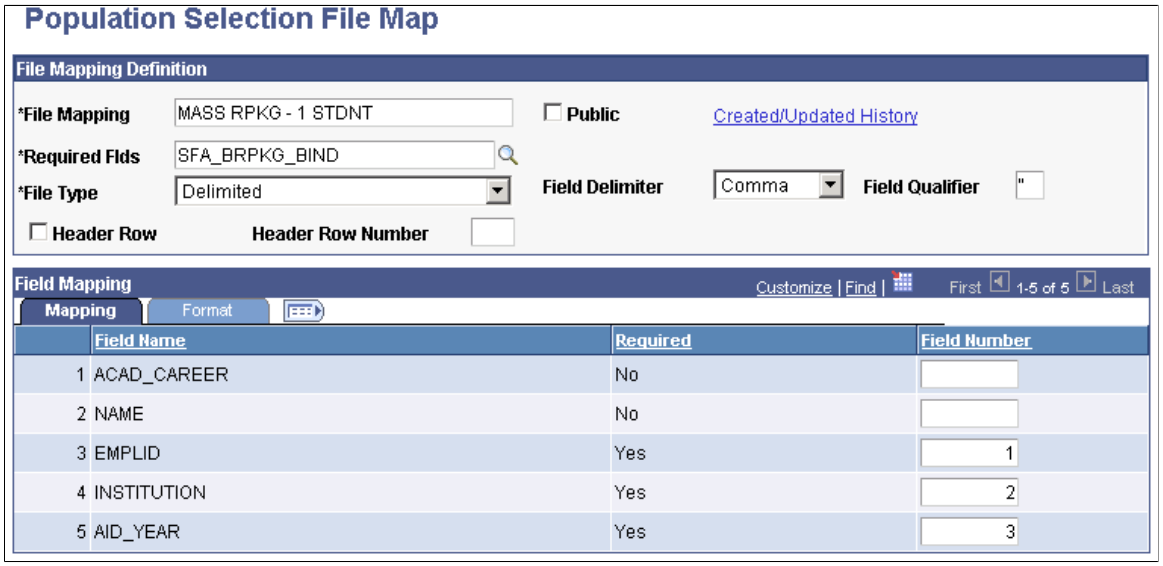
### External File Mapping

This section shows a completed Population Selection File Map page.

**Image: Example of the Population Selection File Map page**

This example illustrates the fields and controls on the Example of the Population Selection File Map page. You can find definitions for the fields and controls later on this page.




# Running the Population Update Process

This section provides an overview of the Population Update process and discusses how to set parameters for running the process.

## Understanding the Population Update Process

Population Update is a process that uses the Population Selection utility to update values in selected fields. Your institution or department must choose the records and fields to make available for update and set user security to identify which users can update the records. The user selects the records and fields to update on the Population Selection Update run control page.

Each record that can be updated by the process has a query to use for population selection. This query is joined with other records to determine the population that you want to update when you use the PS Query selection tool.

Bundle 44

Reorganized Record/Table descriptions using a table.

Added Student Data AUS to the Records configured for Population Update.

The application records that are configured to use the Population Update process are:

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| Record/Table | Description | Additional Information |
|---|---|---|
| ADM_APPL_DATA | Admission Application Data | Optional Batch Enterprise Integration Point (EIP) for this record. |
| ADM_APPL_RCR_CA | Admission Application Recruitment Category | Optional Batch Enterprise Integration Point (EIP) for this record. |
| ADM_PRSPCT_CAR | Admission Prospect Career | Optional Batch Enterprise Integration Point (EIP) for this record. |
| INAS_CALC_RECS | Records needing INAS Calculations | Hardcoded value "P" for Protection Reason. |
| INAS_FED_EXT | Federal Overrides for INAS | |
| INAS_PROF_EXT | Profile Overrides for INAS | |
| ISIR_CONTROL | ISIR Internals/Control Data | For this record, you can update the existing effective dated row or insert a new effective dated row. |
| ITEM_TYPE_FISCL | Fiscal Item Type Table | SetID, Item Type, and Aid Year are required fields.<br><br>If any of the Budgeted fields are populated by Population Update, then "Audit Process Type" will reflect "Population Update".<br><br>Population Update does not perform any inserts into the Fiscal Item Type table, only updates, to existing Item Types. |
| ITEM_TYPE_FNOTE | Fiscal Item Type Notes Table | SetID, Item Type, and Aid Year are required fields.<br><br>Population Update does not perform any inserts into the Fiscal Item Type Comments table; only updates to existing Item Types. |
| LOAN_DISBMNT | Loan Disbursement | |
| LOAN_ORIGNATN | Loan Origination | Logic to update Borrower Citizenship Status for Grad PLUS, Subsidized, and Unsubsidized Loans.<br><br>Override Academic Year Start and Override Academic Year End = Y/N<br><br>Loan Refund Indicator = Student, Borrower |
| LOAN_ORIG_DTL | Loan Origination Detail | Hold/UnHold logic, custom translates.<br><br>Logic to update Borrower Citizenship Status for Grad PLUS, Subsidized, and Unsubsidized Loans. |
| PELL_DISBMNT | Pell Disbursement | |
| PELL_ORIGINATN | Pell Origination | |
| PELL_ORIG_DTL | Pell Origination Detail | The date fields associated with Pell Origination Status and Pell Trans Status are also updated with the system date.<br><br>Corresponding update to Student Aid Attribute. |


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| Record/Table | Description | Additional Information |
|---|---|---|
| PERS_INST_REL | Person Relationships with Institution | |
| RESIDENCY_OFF | Official Residency Data | EMPLID, Academic Career, Institution, Effective Term are required fields.<br><br>Population Update does not perform any inserts, only updates, to existing entries. |
| SFA_ASG_ORG_ DTL | ACG/SMART Origination Detail | |
| SFA_EASTAGE_ DTL | External Award Staging detail record | Custom translate for processing status. |
| SFA_LN_CNSL_ TBL | Loan Counseling Information | Counseling Requirement: Required Annually, Required Once.<br><br>Status: Completed, Incomplete, Pending.<br><br>Comment: limited to 25 characters.<br><br>Population Update does not perform any inserts into the Loan Counseling table, only updates, to existing Loan Counseling rows. |
| SFA_SAP_STDNT2 | SAP Student Career Exceptions | Operator ID of the person running update and date/time stamp of the process.<br><br>Validation of EMPLIDs selected for Population Update process. |
| SFA_SAP_STDNT3 | SAP Student Term Exceptions | Operator ID of the person running update and date/time stamp of the process.<br><br>Validation of EMPLIDs selected for Population Update process. |
| SFA_SAP_STDNT4 | SAP Student Aid Year Exception | Operator ID of the person running update and date/time stamp of the process.<br><br>Validation of EMPLIDs selected for Population Update process. |
| SFA_SLC_ STUDENT | SLC Student Data Table | |
| SSR_STDNT_DATA | Student Data AUS | CHESSN Data - Student Consent values |
| STDNT_AGGR_ LIFE | Student Lifetime Aggregate Awards | When the NSLDS Total (amount) field is updated, Population Update sets the Override check box, the Operator ID displays SCC_POP_ UPD, and date/time stamp of the process is captured.<br><br>Similarly, you have the option of only selecting (or de-selecting) the Override checkbox itself through Population Update without populating the NSLDS Total (amount) field. When you select the Override checkbox, the Operator ID displays SCC_POP_UPD along with the corresponding date/timestamp. When you de-select the Override checkbox, the Population Update routine removes the SCC_ POP_UPD Operator ID.<br><br>EMPLIDand AGGREGATE_AREA are required fields |

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| Record/Table | Description | Additional Information |
|---|---|---|
| STDNT_AID_ ATRBT | Packaging Status Summary | |
| STDNT_AWARDS | Student Awards | |
| STDNT_AWRD_ PER | Student Award Period Table | FAN Ltr Status: Hold, Initial, Printed, Revised<br><br>EMPLID, Institution, and Aid Year are required fields |
| STDNT_CAREER | Student Career | The date field associated with the Synchronize Advisement Report is also updated with the system date. |
| STDNT_CAR_ TERM | Student Career Term | |
| STDNT_EQUTN_ VAR | Student Equation Variables | |
| STDNT_FA_TERM | Student FA Term | Update of Override fields related to update of FA Load, NSLDS Loan Year, and Direct Lending Year.<br><br>Validation of entered FA load value.<br><br>For this record, you can update the existing effective dated row or insert a new effective dated row. |
| STDNT_PKG_VAR | Student Packaging Variables | |

### Related Links

"Securing and Setting Up the Population Update Process" (PeopleSoft Campus Solutions 9.2: Application Fundamentals)

Using the Population Selection Process

## Page Used to Run the Population Update Process

| Page Name | Definition Name | Navigation | Usage |
|---|---|---|---|
| Population Selection Update | SCC_RUNCTL_POP_UPD | Set Up SACR, System Administration, Utilities, Population Update, Population Update Process, Population Selection Update | Set parameters for running the Population Update process. |

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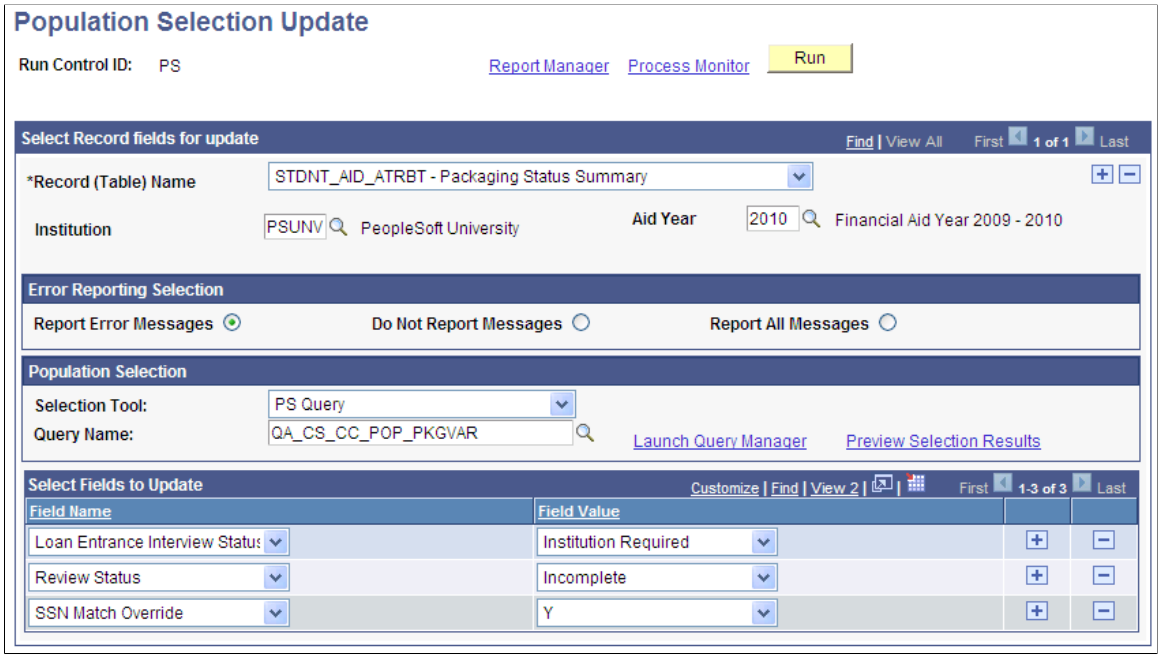
# Selecting the Update Parameters

Access the Population Selection Update page (Set Up SACR, System Administration, Utilities, Population Update, Population Update Process, Population Selection Update).

**Image: Population Selection Update page**

This example illustrates the fields and controls on the Population Selection Update page. You can find definitions for the fields and controls later on this page.




## Select Record/Field for Update

**Record (Table) Name**

Select the name of the record to update.

Only the records to which you have security access and that your institution or department has made available for updating are available values.

Multiple tables can be updated on one run control. A table can be referenced only once per run control because the table is a key field for the process.

When you enter the Record (Table) Name, the fields that are available for update become available for selection.

**Institution** and **Aid Year**

Enter the Institution and Aid Year. When you enter the record name, the system displays the key fields for that record so that you can specify the exact rows to update in the table.

For example, for Financial Aid records, the Institution and Aid Year fields appear.

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## Error Reporting Selection

You can choose to have the process display error messages only or all of the messages that it encounters during the update, or you can choose not to display any of the messages. Displaying at least the error messages gives you an opportunity to decide whether to investigate and resolve the problems.

## Population Selection

Fields and links in this group box behave as in the standard Population Selection group box throughout Campus Solutions.

See Understanding the Population Selection Group Box.

| | |
|---|---|
| **Selection Tool** | Select the Selection Tool that your institution uses to select the population to update: *PS Query, Equation Engine,* or *External File.* |
| **Query Name, Equation Name,** or **File Name** | Enter the name of the query, equation, or file that you use to select the population that you want to update.<br><br>For PS Query, the list of available queries is determined by Record (Table) Name selected for update. |

## Select Fields to Update

When you enter the Record (Table) Name, the fields that are available for update become available for selection.

| | |
|---|---|
| **Field Name** and **Field Value** | Select each field that you want to update and the value to use.<br><br>When you run the Population Update process, the system finds the record and updates the field values with the values that you specify for the records that you have identified using the Population Selection utility. |


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