

<b>Version</b>	<b>1.0</b>
<b>Document Generation Date</b>	<b>10/29/2008</b>
<b>Date Modified</b>	<b>10/29/2008</b>
<b>Last Changed by</b>	<b>ASDS</b>
<b>Status</b>	<b>Draft</b>

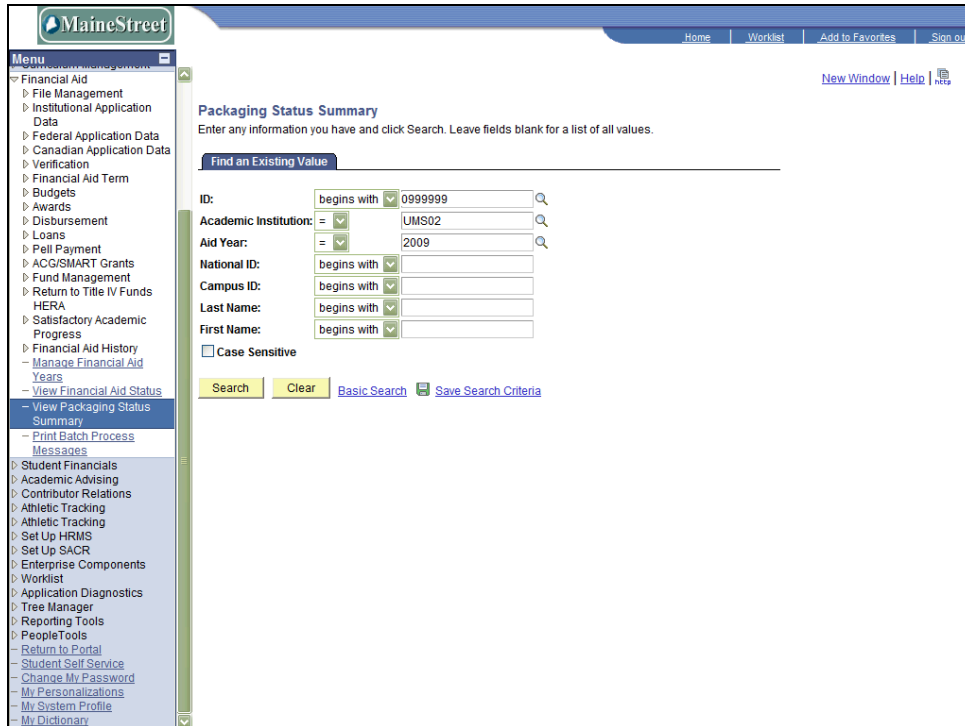
## **Assigning Self Service Access**

### **Concept**

MaineStreet allows you to control if/when students may view and/or update their awards in self service. When a student is aid year activated the default settings allow inquiry but not update access. These settings may be changed on a student by student basis on the Packaging Status Summary screen or by using this batch process.

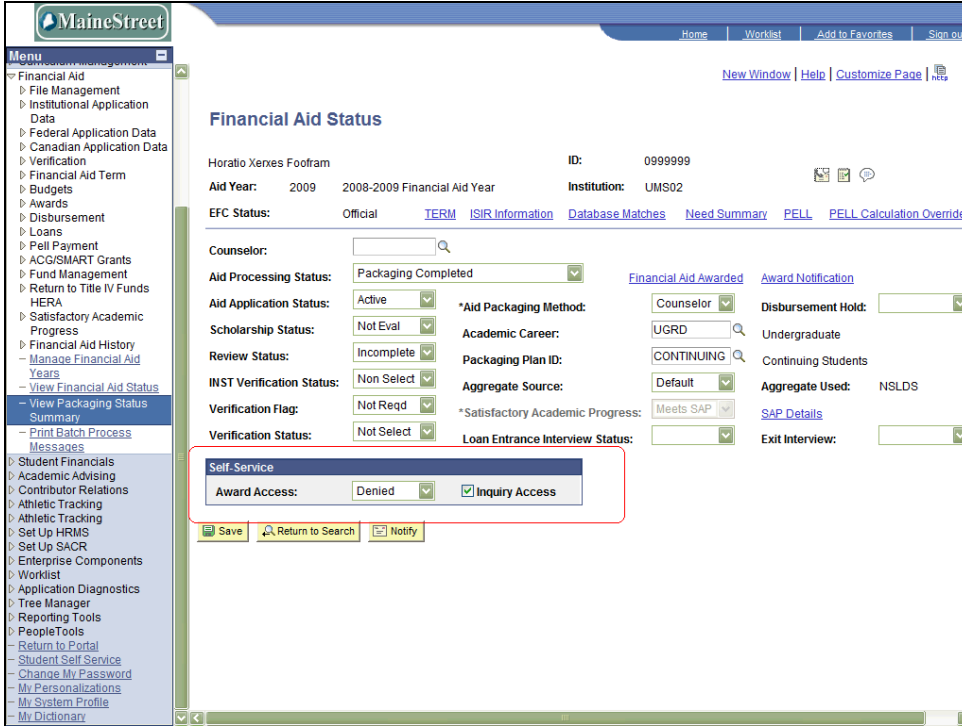
## Procedure

Step	Action
1.	Navigate to the Packaging Status Summary page to view a student's current self service access. Navigate: <b>Financial Aid &gt; View Packaging Status Summary.</b>



The screenshot shows the 'Packaging Status Summary' page in the MaineStreet system. The page includes a navigation menu on the left with 'View Packaging Status Summary' selected. The main content area contains search criteria fields: ID (begins with 0999999), Academic Institution (UMS02), Aid Year (2009), National ID (begins with), Campus ID (begins with), Last Name (begins with), and First Name (begins with). There is a 'Case Sensitive' checkbox and a 'Search' button.

Step	Action
2.	Enter search criteria to identify the student. Click the <b>Search</b> button.



**MaineStreet** Home Worklist Add to Favorites Sign out

New Window | Help | Customize Page |

### Financial Aid Status

Horatio Xerxes Footram ID: 0999999

Aid Year: 2009 2008-2009 Financial Aid Year Institution: UMS02

EFC Status: Official [TERM](#) [ISIR Information](#) [Database Matches](#) [Need Summary](#) [PELL](#) [PELL Calculation Override](#)

Counselor:

Aid Processing Status: Packaging Completed [Financial Aid Awarded](#) [Award Notification](#)

Aid Application Status: Active \*Aid Packaging Method: Counselor Disbursement Hold:

Scholarship Status: Not Eval Academic Career: UGRD Undergraduate

Review Status: Incomplete Packaging Plan ID: CONTINUING Continuing Students

INST Verification Status: Non Select Aggregate Source: Default Aggregate Used: NSLDS

Verification Flag: Not Req'd \*Satisfactory Academic Progress: Meets SAP [SAP Details](#)

Verification Status: Not Select Loan Entrance Interview Status:  Exit Interview:

**Self-Service**

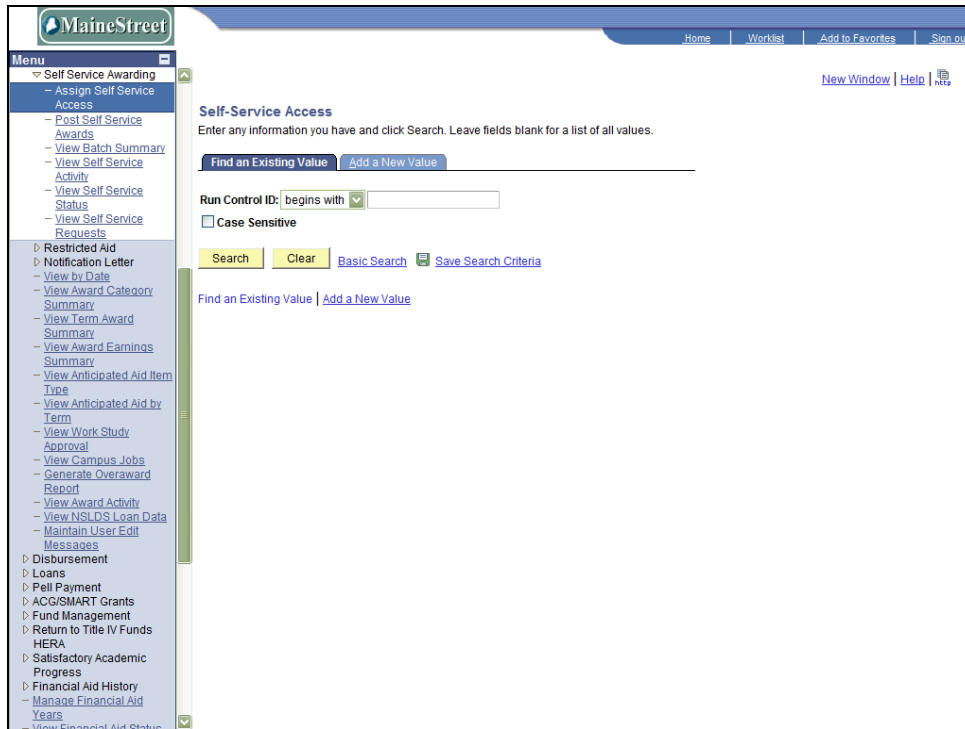
Award Access: Denied  Inquiry Access

Save Return to Search Notify

Step	Action
3.	The student in this example has view only access to his financial aid in self service. He does not have the ability to accept, reduce or decline awards.
4.	To run the process to change the self service access settings, navigate: <b>Financial Aid &gt; Awards &gt; Self Service Awarding &gt; Assign Self Service Access.</b>

# Process Document

## Financial Aid: Assigning Self Service Access-101508



**MaineStreet**

Home | Worklist | Add to Favorites | Sign out

**Menu**

- Self Service Awarding
  - Assign Self Service Access
  - Post Self Service Awards
  - View Batch Summary
  - View Self Service Activity
  - View Self Service Status
  - View Self Service Requests
- Restricted Aid
- Notification Letter
  - View by Date
  - View Award Category Summary
  - View Term Award Summary
  - View Award Earnings Summary
  - View Anticipated Aid Item Type
  - View Anticipated Aid by Term
  - View Work Study Approval
  - View Campus Jobs
  - Generate Overaward Report
  - View Award Activity
  - View NSLDS Loan Data
  - Maintain User Edit Messages
- Disbursement
- Loans
- Pell Payment
- ACG/SMART Grants
- Fund Management
- Return to Title IV Funds HERA
- Satisfactory Academic Progress
- Financial Aid History
  - Manage Financial Aid Years
  - View Financial Aid Status

**Self-Service Access**

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

[Find an Existing Value](#) | [Add a New Value](#)

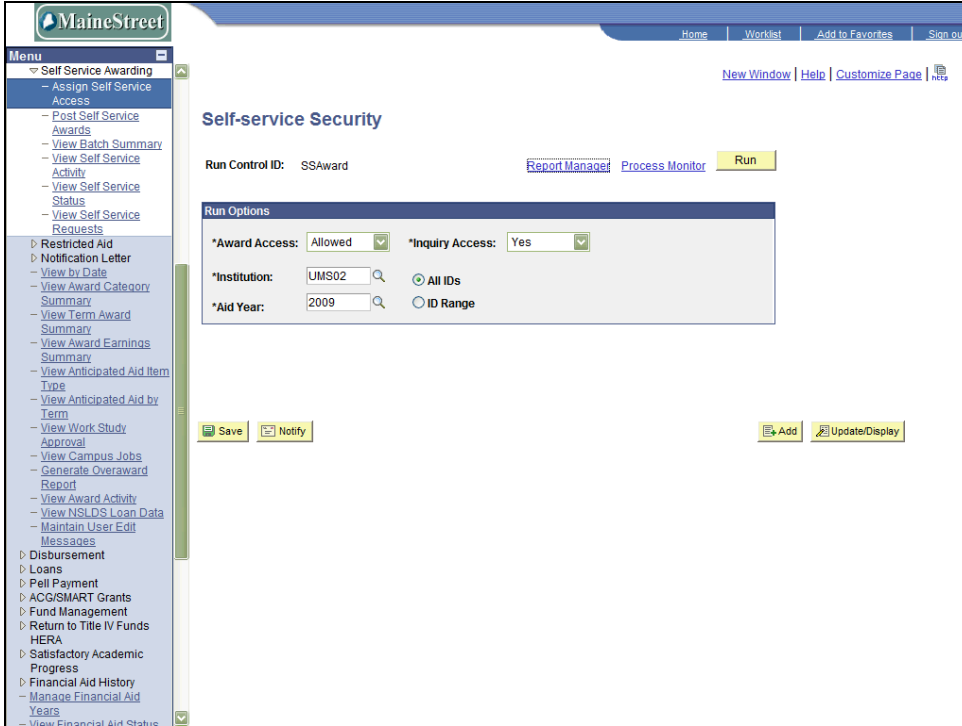
Run Control ID: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)


Step	Action
5.	The process requires a Run Control ID. Either select an existing Run Control ID, or create a new one. To create a new ID, click the <b>Add a New Value</b> tab, enter a name for the new Run Control ID, and click the <b>Add</b> button.



The screenshot shows the 'Self-service Security' configuration page in the MaineStreet system. The 'Run Control ID' is 'SSAward'. The 'Run Options' section includes the following fields:

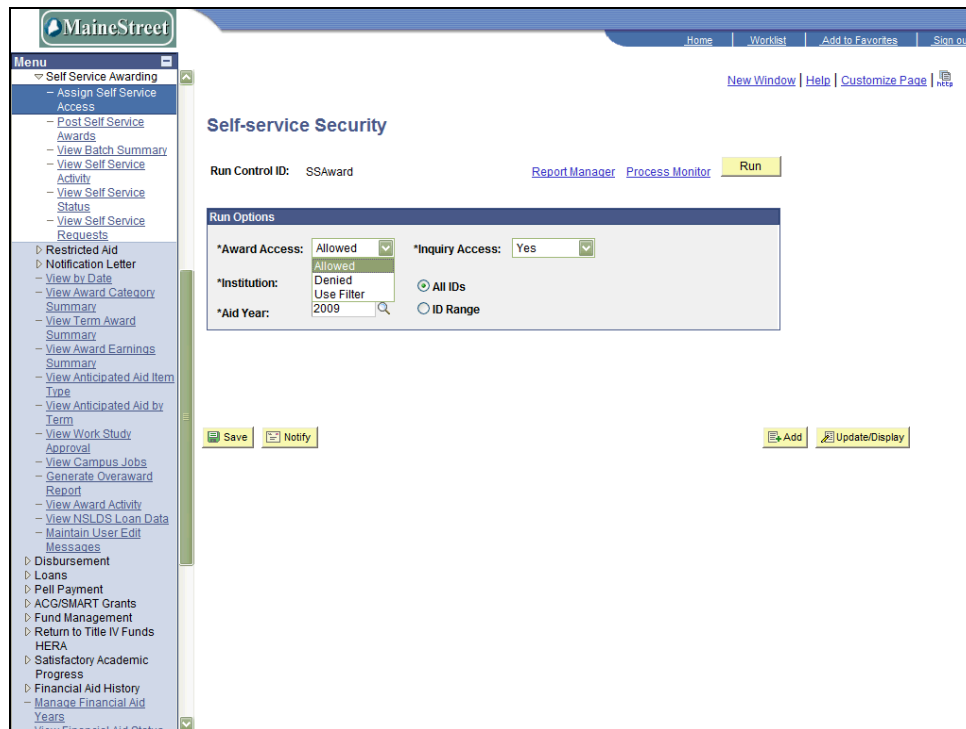
- \*Award Access: Allowed (dropdown menu)
- \*Inquiry Access: Yes (dropdown menu)
- \*Institution: UMS02 (text input with search icon)
- \*Aid Year: 2009 (text input with search icon)
- Radio buttons for 'All IDs' (selected) and 'ID Range'.

Buttons for 'Save', 'Notify', 'Add', and 'Update/Display' are visible at the bottom of the form.

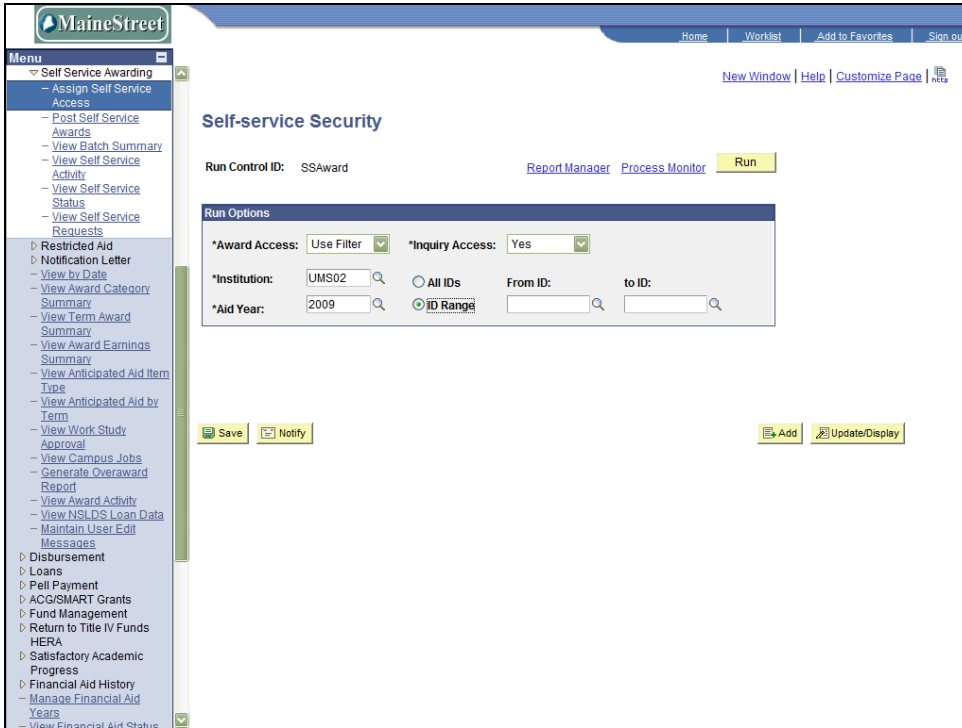
Step	Action
6.	<p>The <b>Inquiry Access</b> field controls whether the students can view their financial aid in self service. The <b>Award Access</b> field sets students' access in self service to accept, decline or reduce awards.</p> <p>The choices for <b>Inquiry Access</b> are Yes or No.</p> <p>Click the <b>Award Access</b> list.</p> <div data-bbox="370 1329 513 1365" style="border: 1px solid black; padding: 2px;"> <span>Allowed</span>  </div>

# Process Document

## Financial Aid: Assigning Self Service Access-101508



Step	Action
7.	The choices for <b>Award Access</b> are "Denied", "Allowed" and "Use Filter." "Denied" means the students will not be allowed to accept, decline or reduce awards. "Allowed" means they can accept, decline or reduce. "Use Filter" means that the students must meet institutional criteria before they may access their awards.
8.	To determine the population of students considered by the process, you can either select <b>All IDs</b> or specify a range of IDs. Click the <b>ID Range</b> option. <input type="radio"/> ID Range



**MaineStreet** Home Worklist Add to Favorites Sign out

**Menu**

- Self Service Awarding
  - Assign Self Service Access
  - Post Self Service Awards
  - View Batch Summary
  - View Self Service Activity
  - View Self Service Status
  - View Self Service Requests
- Restricted Aid
- Notification Letter
  - View by Date
  - View Award Category Summary
  - View Term Award Summary
  - View Award Earnings Summary
  - View Anticipated Aid Item Type
  - View Anticipated Aid by Term
  - View Work Study Approval
  - View Campus Jobs
  - Generate Overaward Report
  - View Award Activity
  - View NSLDS Loan Data
  - Maintain User Edit Messages
- Disbursement
- Loans
- Pell Payment
- ACGSMART Grants
- Fund Management
- Return to Title IV Funds HERA
- Satisfactory Academic Progress
- Financial Aid History
  - Manage Financial Aid Years
  - View Financial Aid Status

**Self-service Security** [New Window](#) [Help](#) [Customize Page](#)

Run Control ID: SSAward [Report Manager](#) [Process Monitor](#) **Run**

**Run Options**

\*Award Access: Use Filter  \*Inquiry Access: Yes

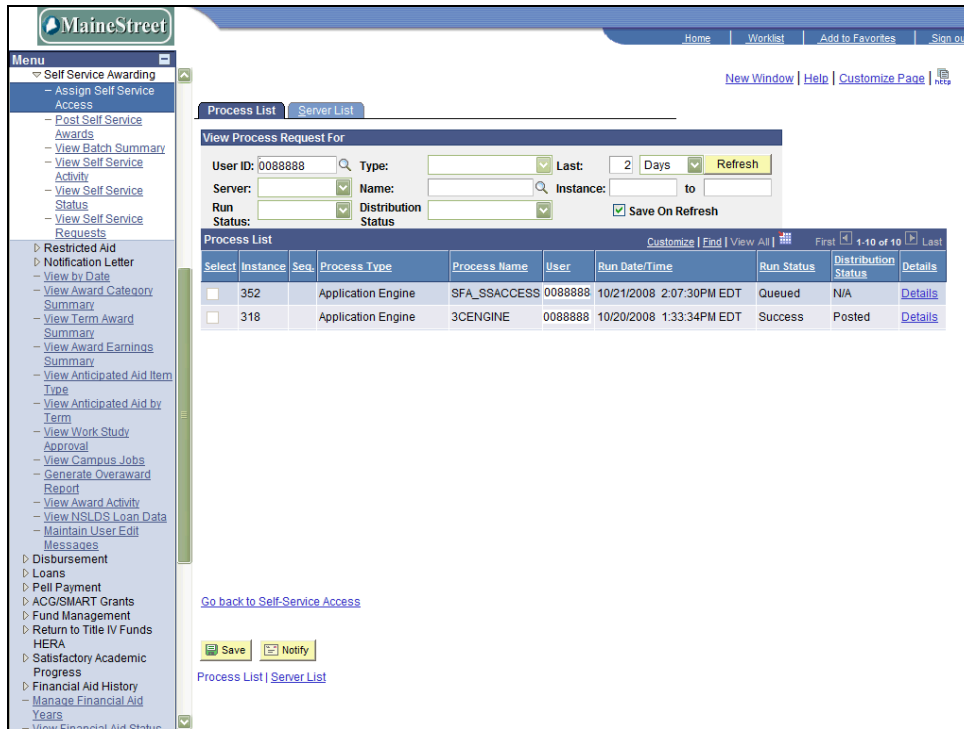
\*Institution: UMS02    All IDs  From ID:  to ID:

\*Aid Year: 2009   ID Range

Step	Action
9.	If you choose <b>ID Range</b> , you will need to enter a range of ID numbers. All students in the range will be processed.
10.	Make sure the correct <b>Institution</b> and <b>Aid Year</b> are entered.  Click the <b>Run</b> button. <input type="button" value="Run"/>
11.	Click the <b>OK</b> button. <input type="button" value="OK"/>
12.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>

# Process Document

## Financial Aid: Assigning Self Service Access-101508

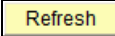




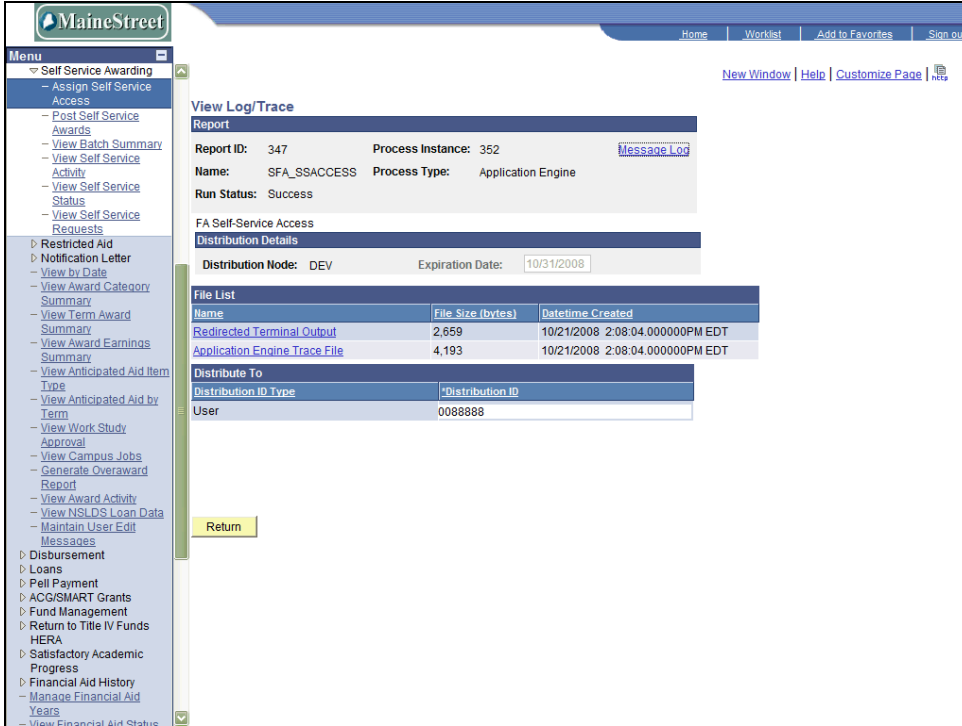
The screenshot shows the 'View Process Request For' form with the following fields:

- User ID: 0088888
- Type: [Dropdown]
- Last: 2 Days
- Refresh button
- Server: [Dropdown]
- Name: [Text]
- Instance: [Text]
- Run Status: [Dropdown]
- Distribution Status: [Dropdown]
- Save On Refresh checkbox (checked)

The 'Process List' table contains the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	352		Application Engine	SFA_SSACCESS	0088888	10/21/2008 2:07:30PM EDT	Queued	N/A	<a href="#">Details</a>
<input type="checkbox"/>	318		Application Engine	3CEngine	0088888	10/20/2008 1:33:34PM EDT	Success	Posted	<a href="#">Details</a>

Step	Action
13.	Click the <b>Refresh</b> button from time to time until the <b>Run Status</b> is <i>Success</i> and the <b>Distribution Status</b> is <i>Posted</i> . 
14.	Click the <b>Details</b> link. 
15.	Click the <b>View Log/Trace</b> link. 



The screenshot shows the 'View Log/Trace' report in the MaineStreet application. The report details the following information:

- Report ID:** 347
- Process Instance:** 352
- Name:** SFA\_SSACCESS
- Process Type:** Application Engine
- Run Status:** Success

Below the report details, there is a 'Distribution Details' section showing:

- Distribution Node:** DEV
- Expiration Date:** 10/31/2008

A 'File List' table is also present, showing two files:

Name	File Size (bytes)	Datetime Created
<a href="#">Redirected Terminal Output</a>	2,659	10/21/2008 2:08:04.000000PM EDT
<a href="#">Application Engine Trace File</a>	4,193	10/21/2008 2:08:04.000000PM EDT

At the bottom of the report, there is a 'Distribute To' section with a table:

Distribution ID Type	Distribution ID
User	0088888

A 'Return' button is located at the bottom left of the report area.

Step	Action
16.	Click <b>Redirected Terminal Output</b> . <a href="#">Redirected Terminal Output</a>

# Process Document

## Financial Aid: Assigning Self Service Access-101508

```

PeopleTools 8.46.17 - Application Engine Server
Copyright (c) 1988-2008 PeopleSoft, Inc.
All Rights Reserved

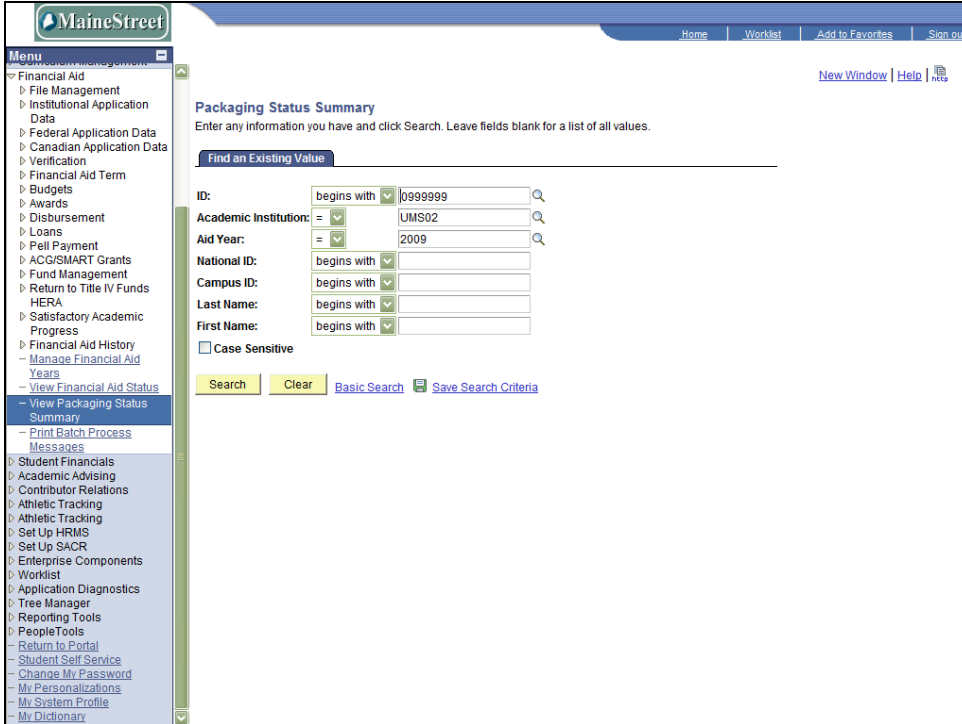
PSAESRV started service request at 14.07.49 2008-10-21

2008-10-21-14.07.49.000026 SearchArchive [1139] Exception logged: RC=3.
2008-10-21-14.07.49.000026 AeCursCheckOutCallState [1103] Exception logged: RC=3.
2008-10-21-14.07.49.000063 GetNextStateRecord [55] Exception logged: RC=3.
2008-10-21-14.07.49.999572 GetNextStateRecord [55] Exception logged: RC=3.
14.07.51 Tracing Application Engine program SFA_SSACCESS SFA Self-Service Access (/opt/pssoft/CSFIXOUT/AE_SFA_SSACCESS_352/A
14.07.51 .(SFA_SSACCESS.MAIN.Step01) (Call Section SFA_SSACCESS.DATETIME)
2008-10-21-14.07.50.999303 SearchArchive [1139] Exception logged: RC=3.
2008-10-21-14.07.50.999303 AeCursCheckOutCallState [1103] Exception logged: RC=3.
14.07.51 ..(SFA_SSACCESS.DATETIME.Step01) (PeopleCode)
14.07.51 .(SFA_SSACCESS.MAIN.Step01) (Log Message)

'SFA_SSACCESS' started at 2008-10-21-14.07.50.000000 (14401,82)
14.07.51 .(SFA_SSACCESS.MAIN.Step02) (Do Select)
14.07.51 .(SFA_SSACCESS.MAIN.Step02) (Do Fetch)
2008-10-21-14.07.50.999381 ExecuteSql [1300] Exception logged: RC=3.
2008-10-21-14.07.50.999381 ExecuteSql [1371] Exception logged: RC=3.
2008-10-21-14.07.50.999381 DoSelect [1690] Exception logged: RC=3.
2008-10-21-14.07.50.999381 DoSelect [1703] Exception logged: RC=3.
14.07.51 .(SFA_SSACCESS.MAIN.Step03) (PeopleCode)
14.07.51 .(SFA_SSACCESS.MAIN.Step04) (Call Section SFA_SSACCESS.UPDALLID)
2008-10-21-14.07.50.999382 SearchArchive [1139] Exception logged: RC=3.
2008-10-21-14.07.50.999382 AeCursCheckOutCallState [1103] Exception logged: RC=3.
14.07.51 ..(SFA_SSACCESS.UPDALLID.Step01) (SQL)
14.07.51 ..(SFA_SSACCESS.UPDALLID.Step01) (Log Message)

14 rows were updated by 'SFA_SSACCESS' in section 'UPDALLID'. (14401,84)
14.07.51 .(SFA_SSACCESS.MAIN.Step05) (Call Section SFA_SSACCESS.DATETIME)
2008-10-21-14.07.50.999382 SearchArchive [1139] Exception logged: RC=3.
  
```

Step	Action
17.	The report opens in a new window.



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Financial Aid', 'Student Financials', and 'Academic Advising'. The 'View Packaging Status Summary' link is highlighted. The main content area is titled 'Packaging Status Summary' and contains a search form with the following fields:

- ID:** begins with [0999999]
- Academic Institution:** [UMS02]
- Aid Year:** [2009]
- National ID:** begins with [ ]
- Campus ID:** begins with [ ]
- Last Name:** begins with [ ]
- First Name:** begins with [ ]

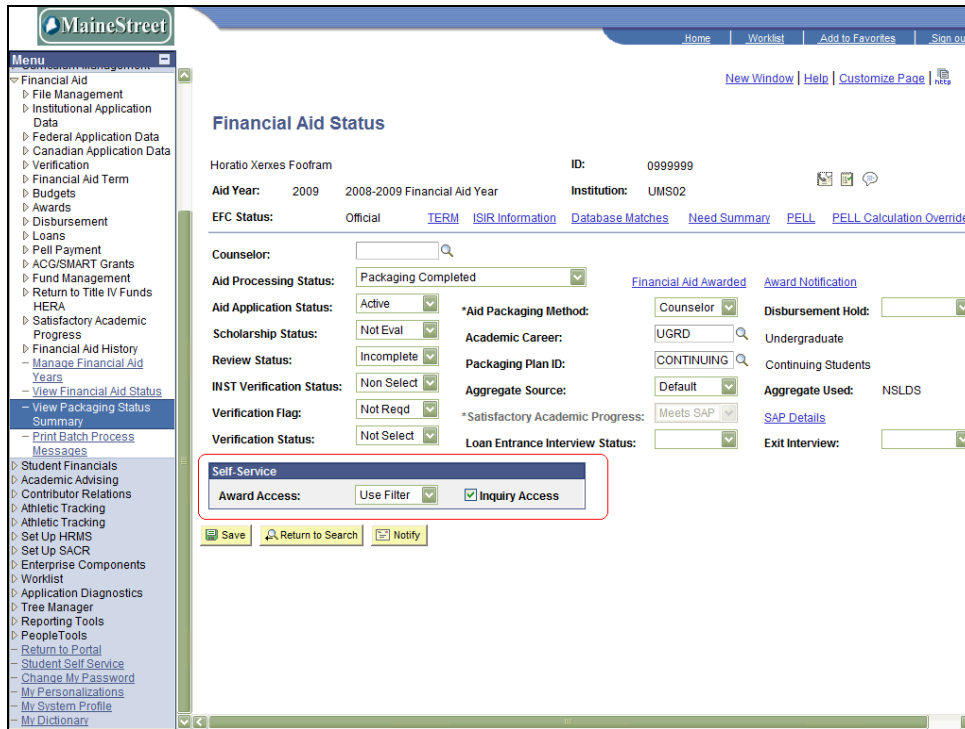
There is a 'Case Sensitive' checkbox and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Step	Action
18.	To check the new self service status of a student, click the <b>View Packaging Status Summary</b> link in the menu. Enter search criteria for the student. Click the <b>Search</b> button.

Search

# Process Document

## Financial Aid: Assigning Self Service Access-101508



Step	Action
19.	The student in this example now has "Use Filter" access to accept, decline or reduce awards. This means that when he goes to financial aid in self service, the filtering rules for his Institution will be applied to determine his access.
20.	<b>End of Procedure.</b>