

<b>Version</b>	<b>1.0</b>
<b>Document Generation Date</b>	<b>4/3/2008</b>
<b>Date Modified</b>	<b>5/1/2008</b>
<b>Last Changed by</b>	<b>ASDS</b>
<b>Status</b>	<b>Draft</b>

## **Building FA Term in Batch**

### **Concept**

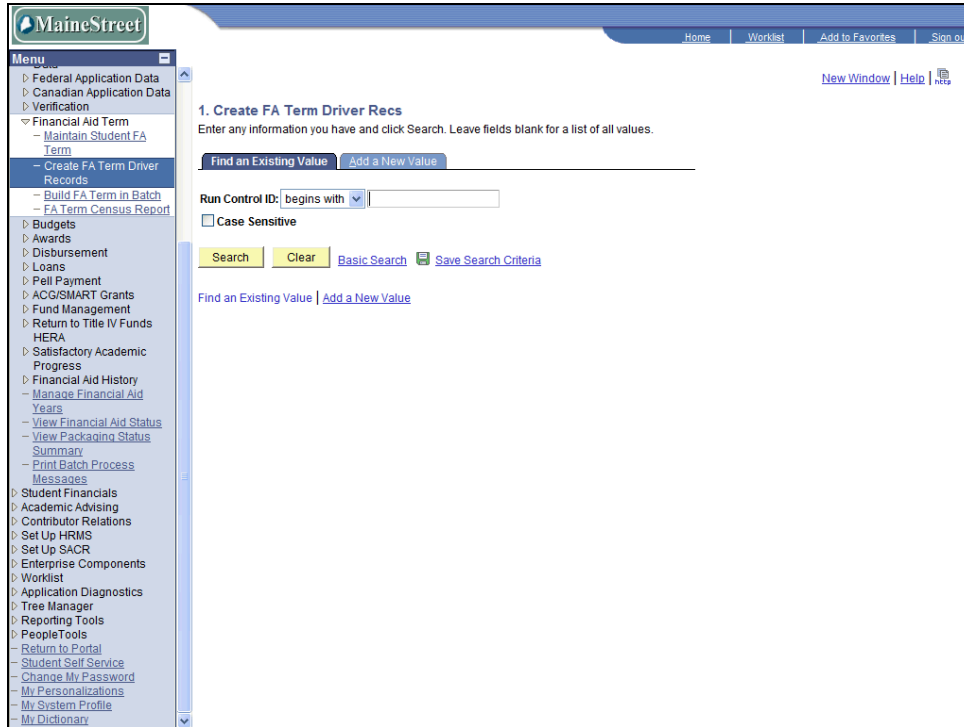
For an exhaustive exploration of the FA Term build process and the data that is generated, please see the topic: Building FA Term Online. In this topic we cover the process of building FA Term in batch.

The build is a two step process:


1. Create an FA Term driver record to identify the students for which to build FA Term.
2. Run the FA Term Build process.

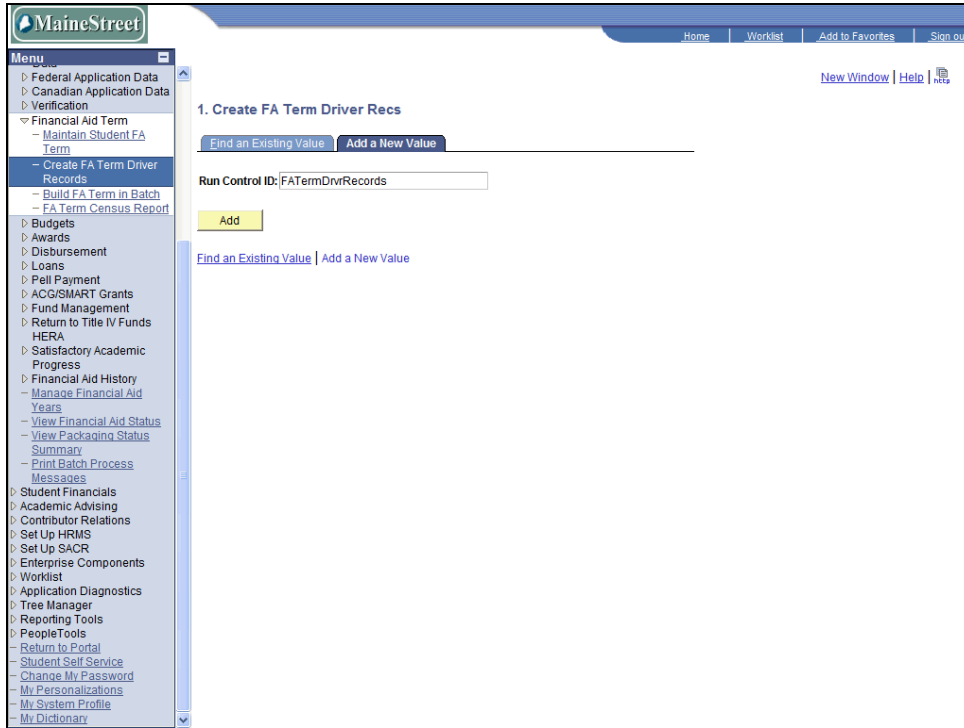
## Procedure

Step	Action
1.	Navigate: <b>Financial Aid &gt; Financial Aid Term &gt; Create FA Term Driver Records.</b>



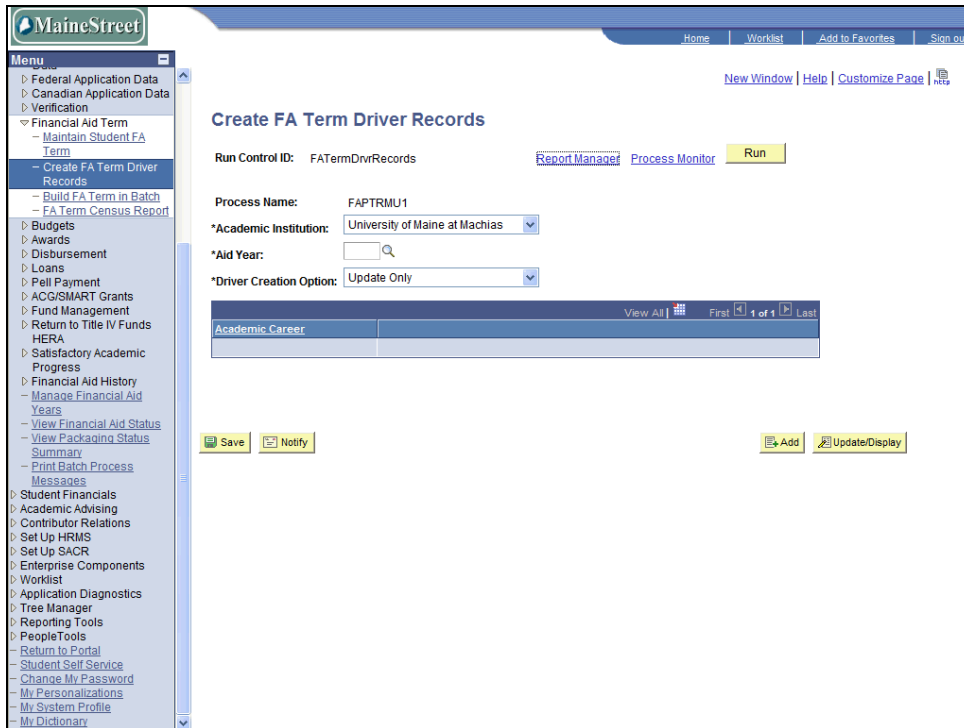
The screenshot shows the 'MaineStreet' web application. The left-hand menu is expanded to show 'Financial Aid Term' > 'Create FA Term Driver Records'. The main content area is titled '1. Create FA Term Driver Recs' and includes instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs is a text input field for 'Run Control ID: begins with' and a 'Case Sensitive' checkbox. At the bottom of the form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A second set of tabs is visible below the main form area.

Step	Action
2.	You need a <b>Run Control ID</b> . You can either use one you have already created or create a new one. To use an existing Run Control ID, click <b>Search</b> and select it from the list.
3.	To create a new Run Control ID, click the <b>Add a New Value</b> tab. Enter the name of the new <b>Run Control ID</b> . Do not use blanks. Click the <b>Add</b> button. 



The screenshot shows the 'MaineStreet' web application interface. The left-hand menu is expanded to 'Financial Aid Term' > 'Create FA Term Driver Records'. The main content area is titled '1. Create FA Term Driver Recs' and contains the following elements:

- Buttons: [Find an Existing Value](#) | [Add a New Value](#)
- Run Control ID:
- Buttons: [Add](#)
- Buttons: [Find an Existing Value](#) | [Add a New Value](#)



The screenshot shows the 'MaineStreet' web application interface for the 'Create FA Term Driver Records' screen. The left-hand menu is expanded to 'Financial Aid Term' > 'Create FA Term Driver Records'. The main content area is titled 'Create FA Term Driver Records' and contains the following elements:

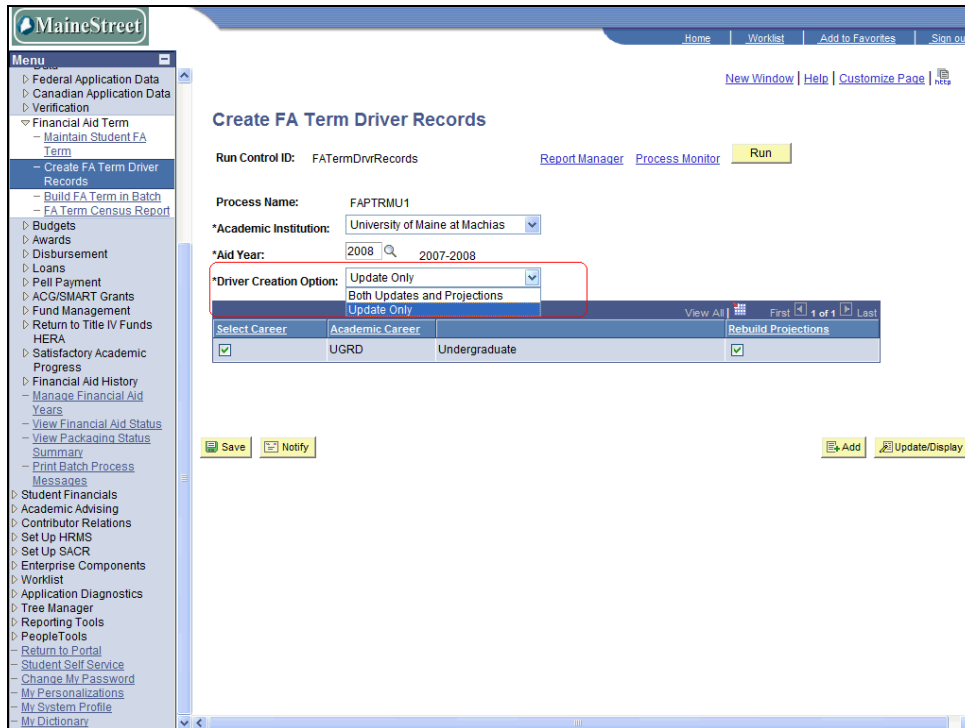
- Buttons: [Report Manager](#) | [Process Monitor](#) | [Run](#)
- Form Fields:
  - Process Name:
  - \*Academic Institution:
  - \*Aid Year:
  - \*Driver Creation Option:
- Table:
 

Academic Career	
- Buttons: [Save](#) | [Notify](#) | [Add](#) | [Update/Display](#)

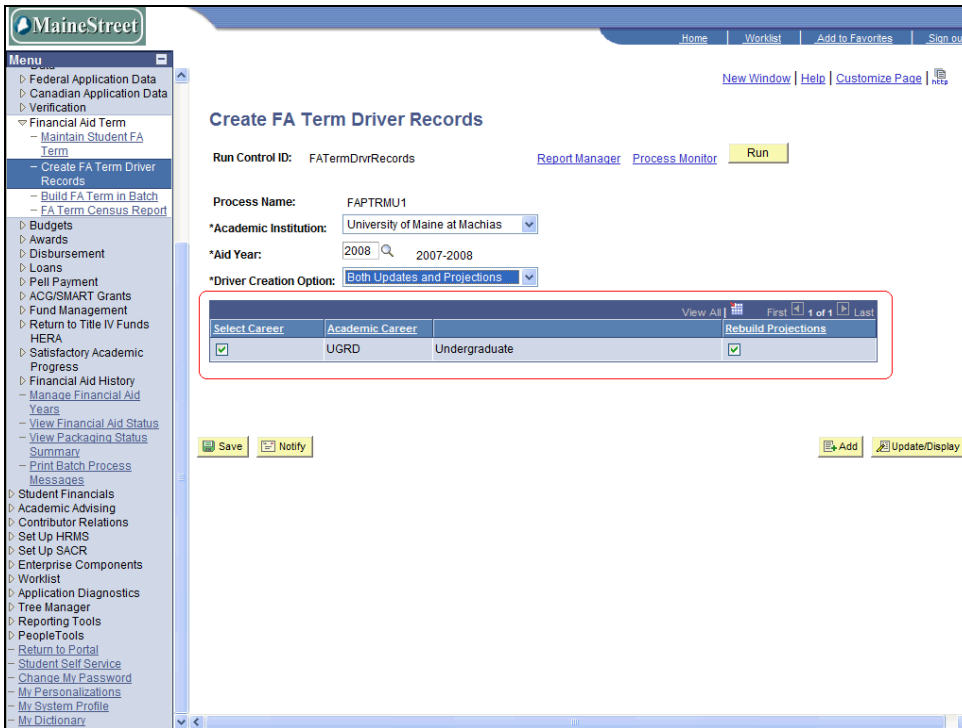
# Process Document

## Financial Aid: Building FA Term in Batch-102607

Step	Action
4.	Make sure that you have the correct <b>Institution</b> and <b>Aid Year</b> entered.
5.	Click the <b>Driver Creation Option</b> list. <div style="border: 1px solid black; padding: 2px; width: fit-content;">Update Only ▾</div>



Step	Action
6.	<p><b>For the Driver Creation Option field:</b></p> <p>Select <b>Update Only</b> if you want to build or rebuild only terms for which the student is currently enrolled. This means only those terms for which the student has enrollment data.</p> <p>Select <b>Both Updates and Projections</b> if you want to build or rebuild terms the student is currently enrolled for as well as terms with projected information. This means that all terms in the aid year are built regardless if the student has enrollment for the term.</p> <p>Normally you would use <b>Both Updates and Projections</b> if you are building FA Term prior to the census date.</p>



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

New Window | Help | Customize Page |

### Create FA Term Driver Records

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

Process Name: FAPTRMU1

\*Academic Institution: University of Maine at Machias

\*Aid Year: 2008 2007-2008

\*Driver Creation Option: Both Updates and Projections

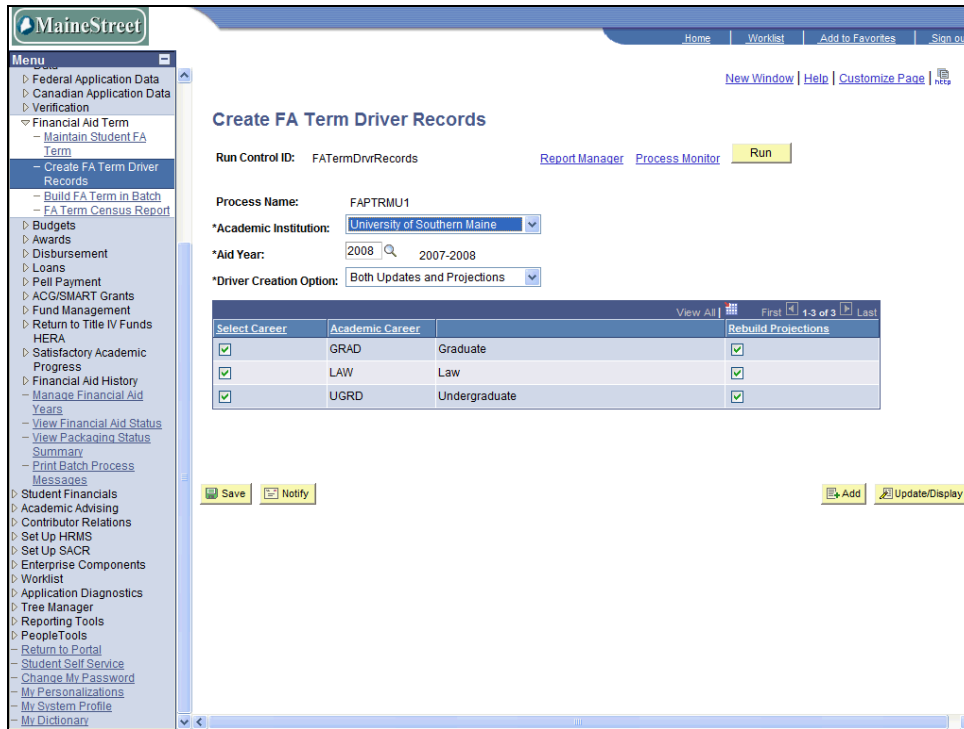
Select Career	Academic Career	Rebuild Projections
<input checked="" type="checkbox"/>	UGRD Undergraduate	<input checked="" type="checkbox"/>

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Step	Action
7.	<p>Notice that the only Academic Career shown in the image above is UGRD. If the Institution had multiple careers that were eligible for financial aid, they would all be listed and you could select which careers to build.</p> <p>The <b>Rebuild Projections</b> checkbox is used to indicate that the financial aid term build process should rebuild projected terms as well as terms with enrollment data. Use this checkbox to rebuild terms when there is a change in career or program.</p>

# Process Document

## Financial Aid: Building FA Term in Batch-102607



**MaineStreet**

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) |

**Create FA Term Driver Records**

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

Process Name: FAPTRMU1

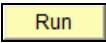
\*Academic Institution:

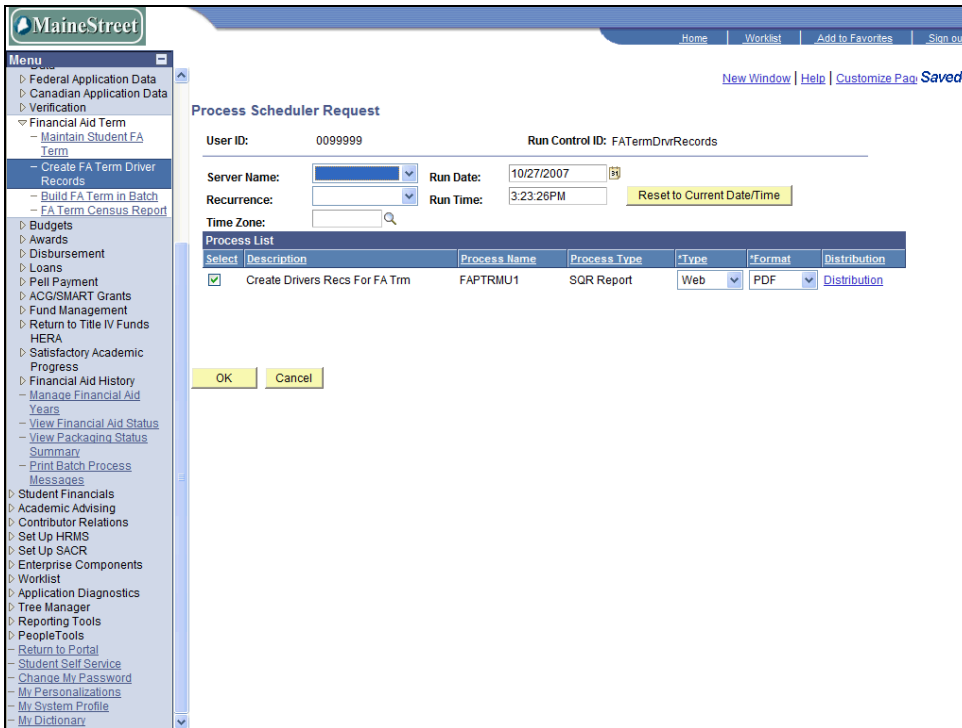
\*Aid Year:

\*Driver Creation Option:

Select Career	Academic Career	Rebuild Projections
<input checked="" type="checkbox"/>	GRAD Graduate	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	LAW Law	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	UGRD Undergraduate	<input checked="" type="checkbox"/>

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Step	Action
8.	The Institution in the example above has multiple careers. You can deselect a career if you want to omit those students from the FA Term build.
9.	Click the <b>Run</b> button. 



**Process Scheduler Request**

User ID: 0099999      Run Control ID: FATermDvrRecords

Server Name:       Run Date: 10/27/2007

Recurrence:       Run Time: 3:23:26PM

Time Zone:

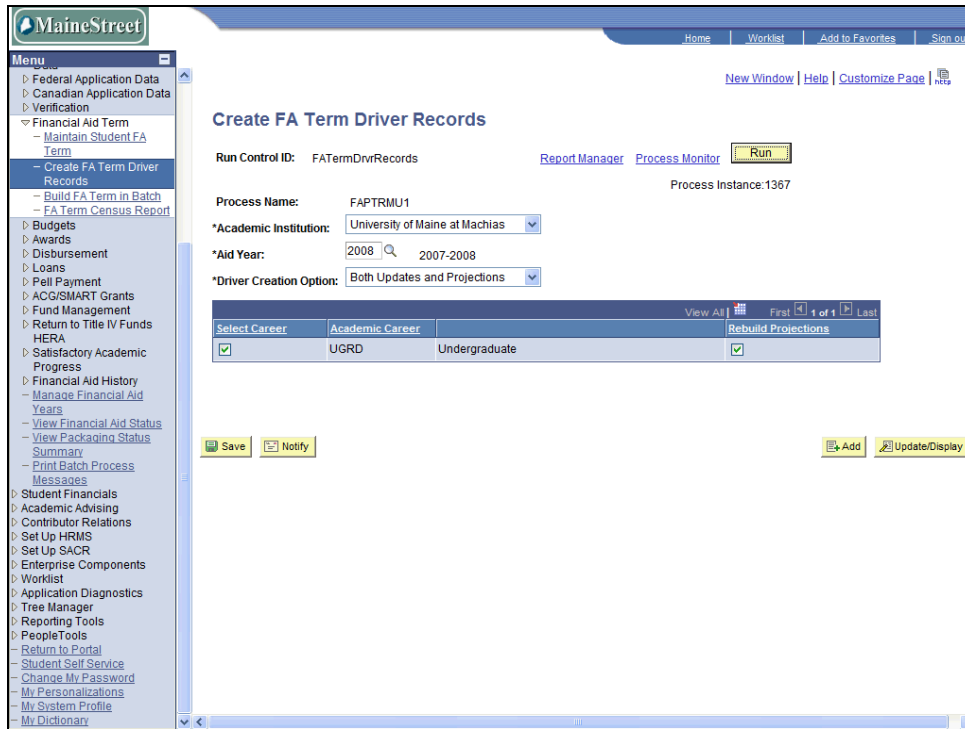
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Create Drivers Recs For FA Trm	FAPTRMU1	SQR Report	Web	PDF	<a href="#">Distribution</a>

Step	Action
10.	Click the <b>OK</b> button. <input type="button" value="OK"/>


# Process Document

## Financial Aid: Building FA Term in Batch-102607



**MaineStreet**

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | [Customize Page](#) | 

**Create FA Term Driver Records**

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

Process Instance: 1367

Process Name: FAPTRMU1

\*Academic Institution: University of Maine at Machias

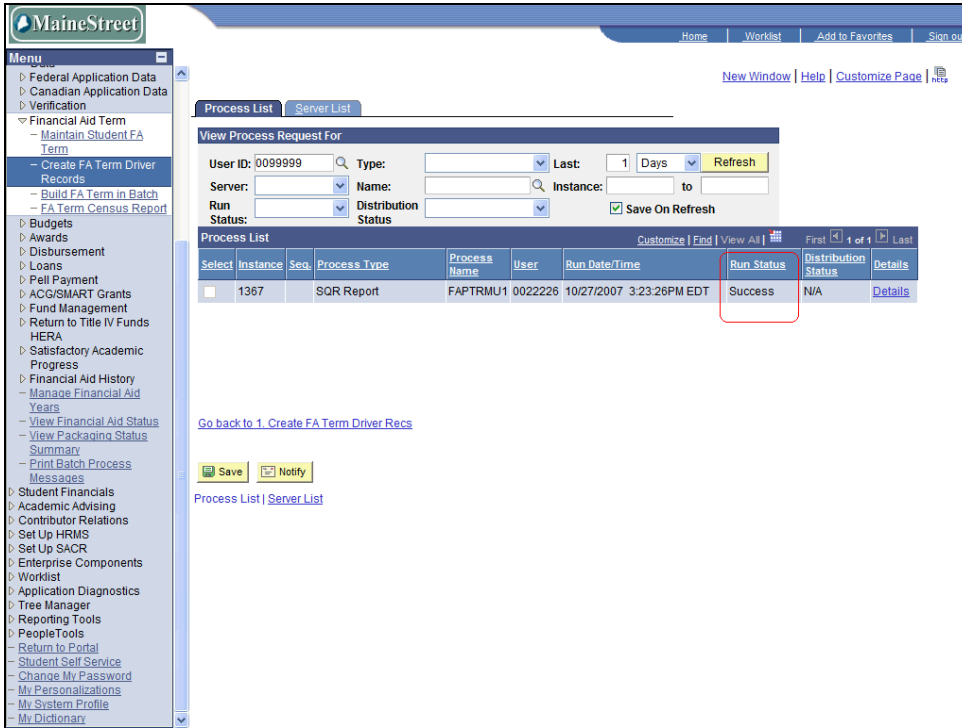
\*Aid Year: 2008 2007-2008

\*Driver Creation Option: Both Updates and Projections

Select Career	Academic Career	Rebuild Projections
<input checked="" type="checkbox"/>	UGRD Undergraduate	<input checked="" type="checkbox"/>

[Save](#) [Notify](#) [Add](#) [Update/Display](#)


Step	Action
11.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Federal Application Data', 'Financial Aid Term', 'Budgets', and 'Student Financials'. The main content area is titled 'Process List' and 'Server List'. Below this is a 'View Process Request For' form with fields for 'User ID: 0099999', 'Server', 'Name', 'Instance', 'Run Status', and 'Distribution Status'. A 'Refresh' button is visible. Below the form is a table with the following data:

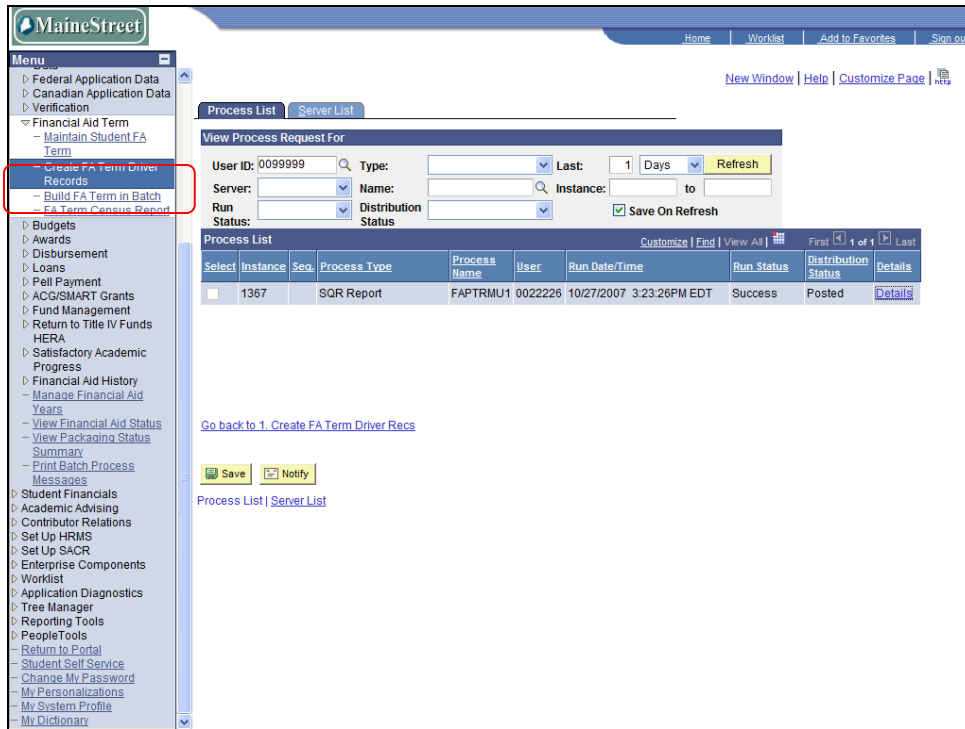
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1367		SQR Report	FAPTRMU1	0022226	10/27/2007 3:23:26PM EDT	Success	N/A	<a href="#">Details</a>

Below the table are buttons for 'Save' and 'Notify', and a link to 'Go back to 1. Create FA Term Driver Recs'. At the bottom, there are links for 'Process List' and 'Server List'.

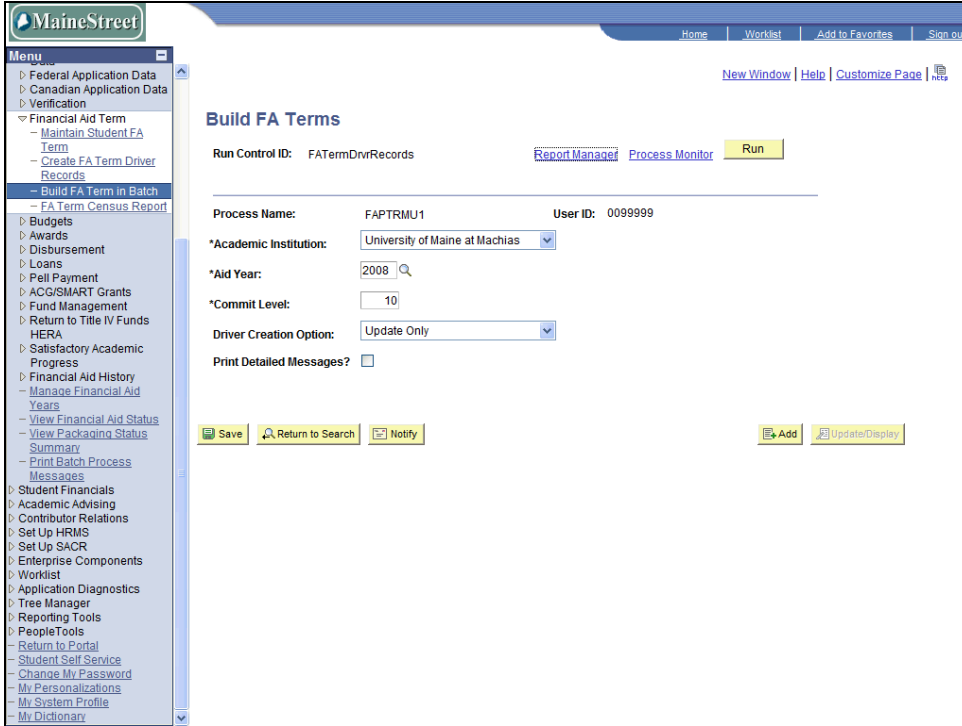
Step	Action
12.	Click the <b>Refresh</b> button from time to time until the <b>Run Status</b> is <i>Success</i> and the <b>Distribution Status</b> is <i>Posted</i> . 
13.	If you want to review the messages from this process click the <b>Details</b> link.

# Process Document

## Financial Aid: Building FA Term in Batch-102607



Step	Action
14.	<p>The Driver Records have been created. The next step is to run the Build FA Term process.</p> <p>Navigate to <b>Build FA Term in Batch</b>.</p> <p><a href="#">Build FA Term in Batch</a></p>



**MaineStreet**

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page

**Build FA Terms**

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

Process Name: FAPTRMU1 User ID: 0099999

\*Academic Institution: University of Maine at Machias

\*Aid Year: 2008

\*Commit Level: 10

Driver Creation Option: Update Only

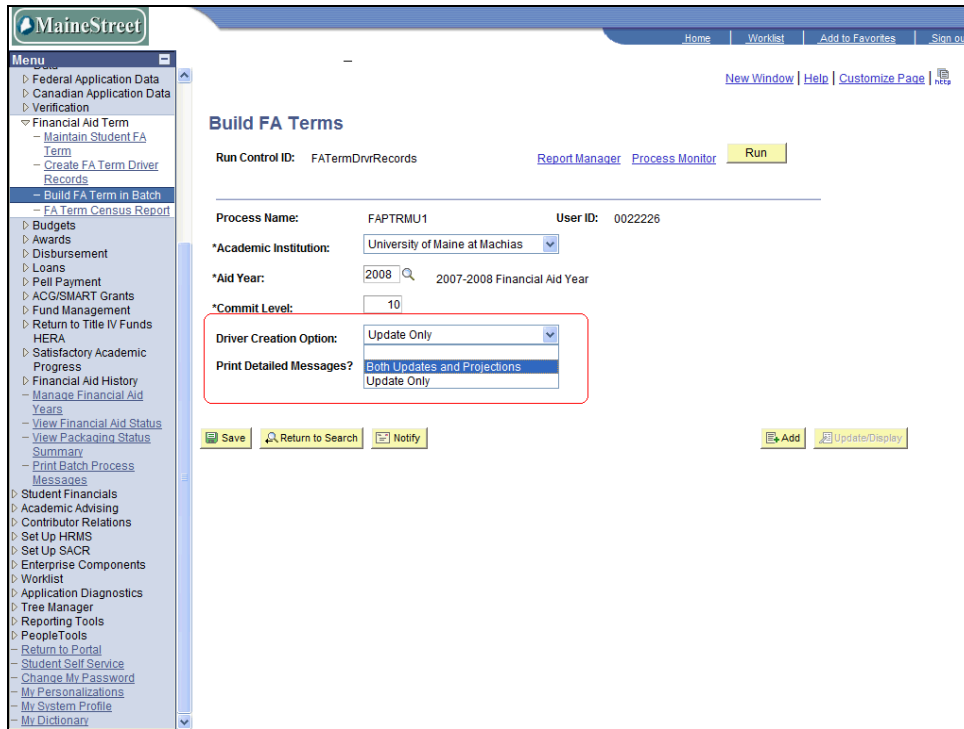
Print Detailed Messages?

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)

Step	Action
15.	<p>Make sure that you have the same <b>Institution</b> and <b>Aid Year</b> here as for the Driver Records process.</p> <p>The <b>Commit Level</b> is used to control how often the records generated by the process are saved to the database. A low Commit Level is safe but inefficient. A high Commit Level runs the risk of data loss if the process errors out.</p>

# Process Document

## Financial Aid: Building FA Term in Batch-102607



**MaineStreet**

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page

**Build FA Terms**

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

Process Name: FAPTRMU1 User ID: 0022226

\*Academic Institution: University of Maine at Machias

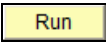
\*Aid Year: 2008 2007-2008 Financial Aid Year

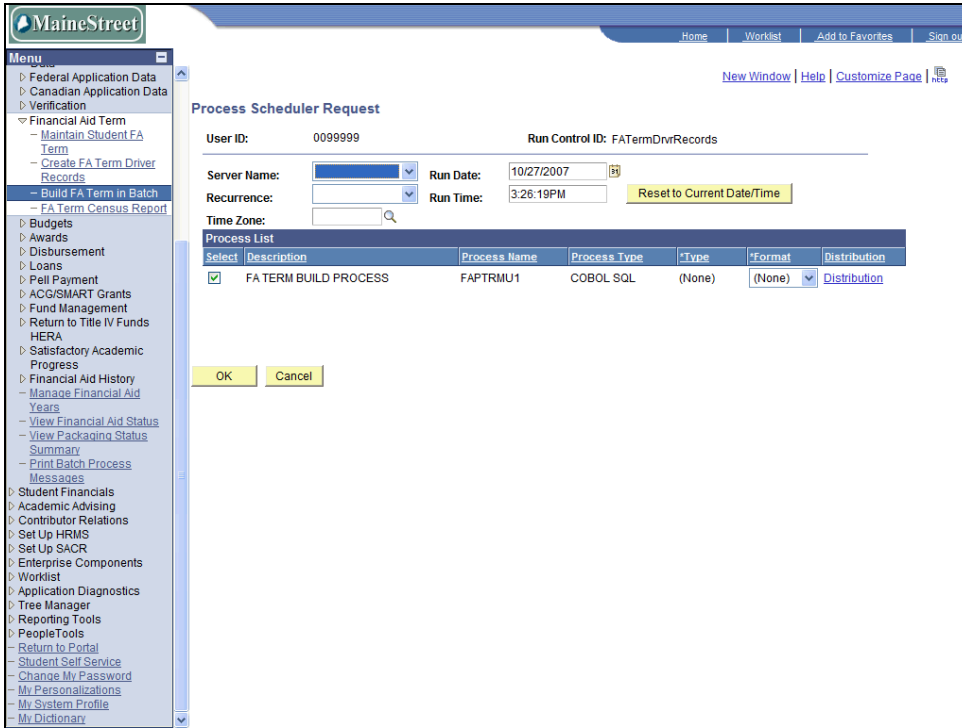
\*Commit Level: 10

Driver Creation Option: Update Only

Print Detailed Messages? Both Updates and Projections  
Update Only

Save Return to Search Notify Add Update/Display

Step	Action
16.	The <b>Driver Creation Option</b> value must match what you used in the Driver Records process.
17.	Click the <b>Run</b> button. 



**Process Scheduler Request**

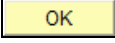
User ID: 0099999      Run Control ID: FATermDnrRecords

Server Name: [Dropdown]      Run Date: 10/27/2007 [TS]      Run Time: 3:26:19PM      [Reset to Current Date/Time](#)

Recurrence: [Dropdown]      Time Zone: [Search]

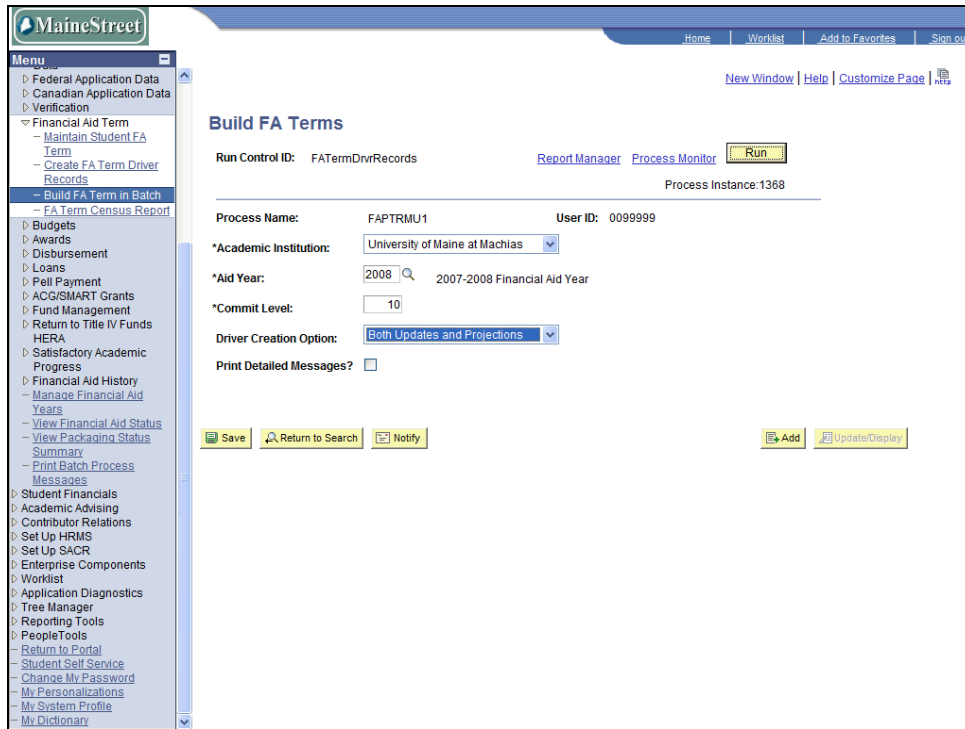
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	FA TERM BUILD PROCESS	FAPTRMU1	COBOL SQL	(None)	(None)	<a href="#">Distribution</a>

[OK](#)      [Cancel](#)

Step	Action
18.	Click the <b>OK</b> button. 

# Process Document

## Financial Aid: Building FA Term in Batch-102607

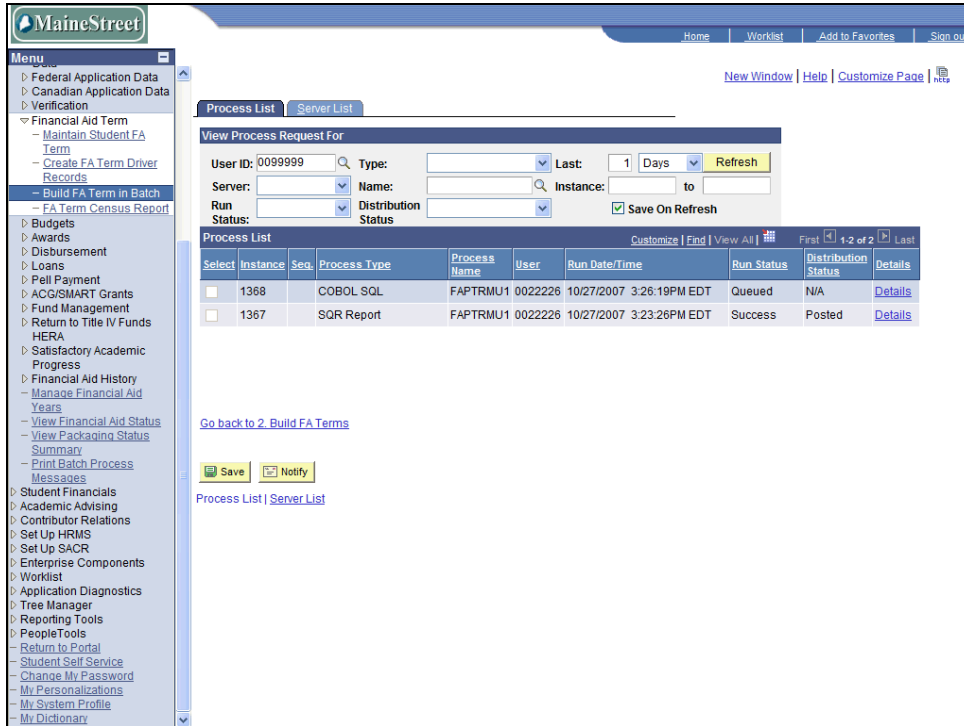


The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Federal Application Data', 'Canadian Application Data', 'Verification', 'Financial Aid Term', 'Budgets', 'Awards', 'Disbursement', 'Loans', 'PELL Payment', 'ACG/SMART Grants', 'Fund Management', 'Return to Title IV Funds', 'HERA', 'Satisfactory Academic Progress', 'Financial Aid History', 'Manage Financial Aid Years', 'View Financial Aid Status', 'View Packaging Status', 'Summary', 'Print Batch Process Messages', 'Student Financials', 'Academic Advising', 'Contributor Relations', 'Set Up HRMS', 'Set Up SACR', 'Enterprise Components', 'Worklist', 'Application Diagnostics', 'Tree Manager', 'Reporting Tools', 'PeopleTools', 'Return to Portal', 'Student Self Service', 'Change My Password', 'My Personalizations', 'My System Profile', and 'My Dictionary'. The main content area is titled 'Build FA Terms' and contains the following information:


- Run Control ID: FATermDvrRecords
- Report Manager | Process Monitor | Run
- Process Instance: 1368
- Process Name: FAPTRMU1 | User ID: 0099999
- \*Academic Institution: University of Maine at Machias
- \*Aid Year: 2008 | 2007-2008 Financial Aid Year
- \*Commit Level: 10
- Driver Creation Option: Both Updates and Projections
- Print Detailed Messages?

At the bottom of the form are buttons for Save, Return to Search, Notify, Add, and Update/Display.

Step	Action
19.	Click the <b>Process Monitor</b> link. <a href="#">Process Monitor</a>



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Federal Application Data', 'Financial Aid Term', and 'Budgets'. The main content area is titled 'Process List' and 'Server List'. It features a 'View Process Request For' form with fields for 'User ID', 'Type', 'Last' (1 Days), 'Server', 'Name', 'Instance', 'Run Status', and 'Distribution Status'. A 'Refresh' button is highlighted in yellow. Below the form is a table with columns: 'Select', 'Instance', 'Seq', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. The table contains two rows: one for instance 1368 (COBOL SQL) with 'Queued' status, and one for instance 1367 (SQR Report) with 'Success' status. A 'Refresh' button is also highlighted in yellow below the table.

Step	Action
20.	Click the <b>Refresh</b> button until the <b>Run Status</b> is <i>Success</i> and the <b>Distribution Status</b> is <i>Posted</i> . You can use the <b>Details</b> link to view messages generated by the process. 
21.	<b>End of Procedure.</b>