

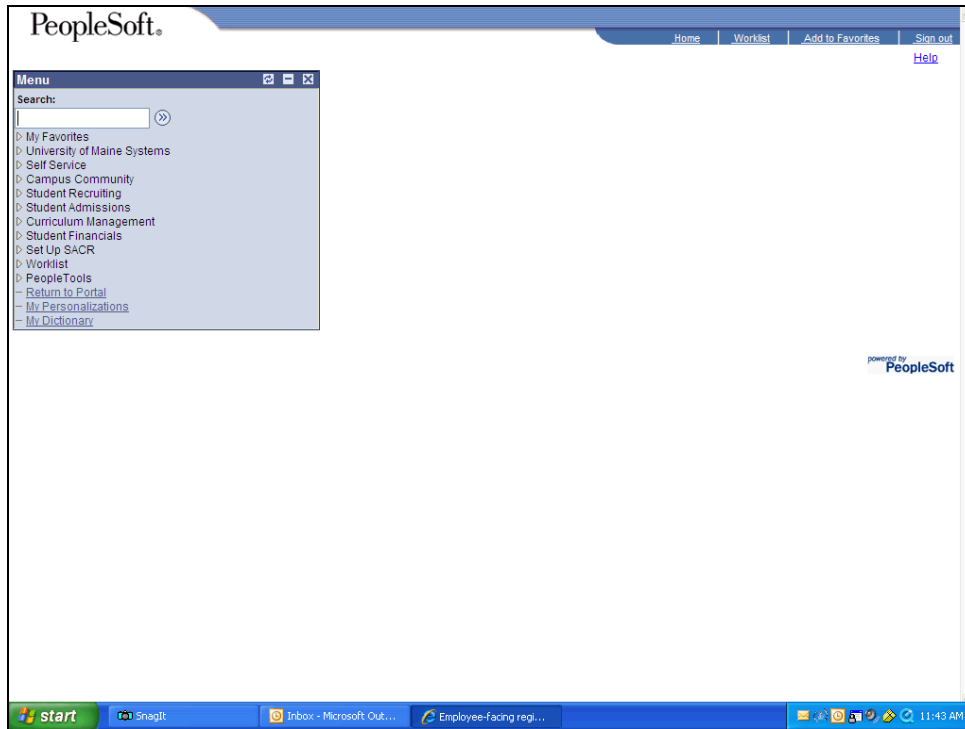
<b>File Name</b>	<b>Group Create_Group Report_091708.doc</b>
<b>Version</b>	<b>8.9</b>
<b>Date Modified</b>	<b>1/10/2008</b>
<b>Last Changed by</b>	<b>ASDS</b>
<b>Status</b>	<b>Final</b>

**Group Create\_Group Report\_Enrollment Deposit**

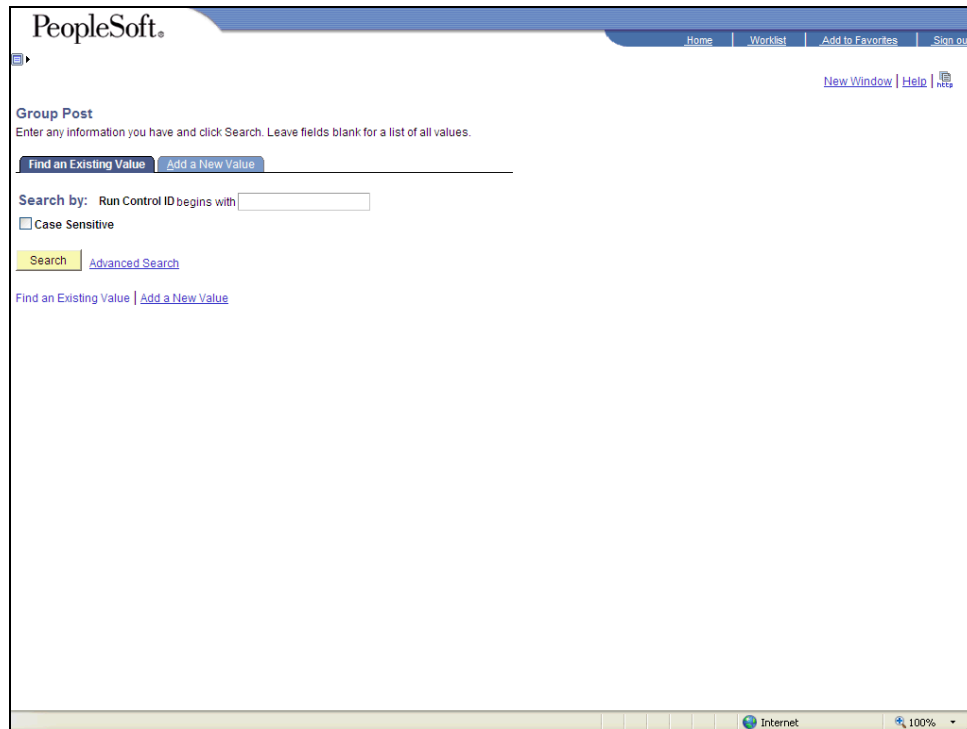
# Process Document

## Group Create\_Group Report\_Enroll Deposit

### Procedure



Step	Action
1.	Click the <b>University of Maine Systems</b> link. <a href="#">▶ University of Maine Systems</a>
2.	Click the <b>Student Financials</b> link. <a href="#">▶ Student Financials</a>
3.	Click the <b>Batch Processing</b> link.
4.	Click the <b>Group Post Creation</b> link.

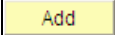


Step	Action
5.	<p>Before you can create the group you must create a <b>Run Control ID</b>. A <b>Run Control ID</b> is an identifier that, when paired with your <b>User ID</b>, uniquely identifies the process you are running.</p> <p>The <b>Run Control ID</b> allows for important parameters to be available for a process when the process runs. This ensures that when a process runs in the background it does not have to prompt you for any additional values. All parameters are stored within the system and associated with Run Control IDs and User IDs. No one else can view or use the Run Control IDs that you create.</p> <p>Click the <b>Add a New Value</b> tab to create a <b>Run Control ID</b>.</p>

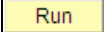
# Process Document

## Group Create\_Group Report\_Enroll Deposit



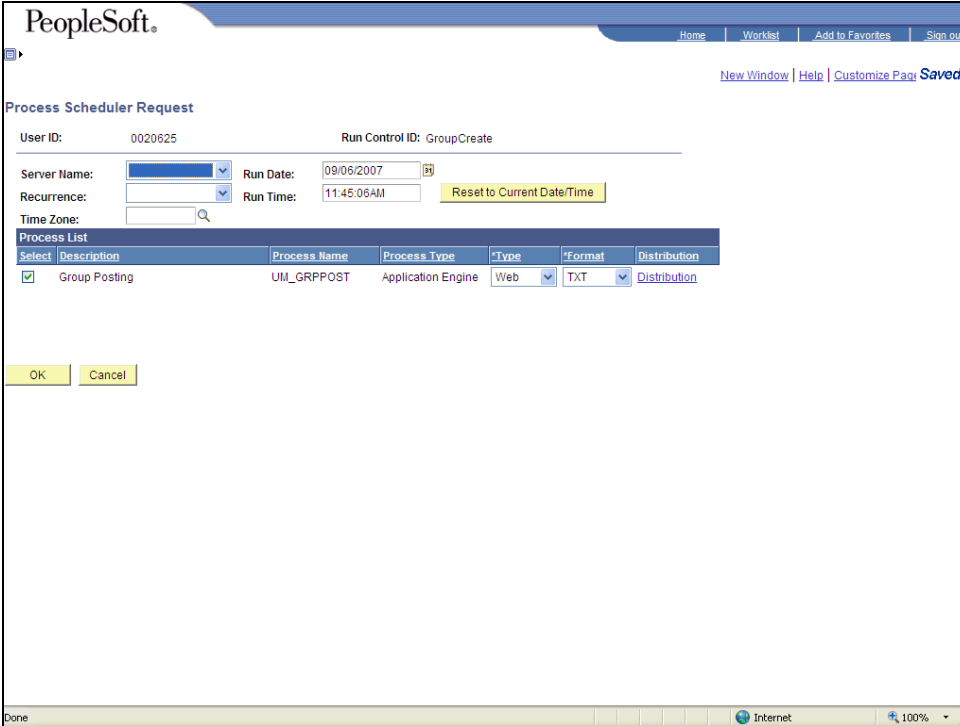
Step	Action
6.	<p>On the <b>Add a New Value</b> page, enter a name for the <b>Run Control ID</b>. Creating a Run Control ID name that is relevant to the process or that is based on your name may help you remember it for future use. By creating your own Run Control ID, you can save it and all of the assigned parameters so that you can easily access this report again in the future.</p> <p>After you create the new Run Control ID, the next time you run this process you will select the <b>Find An Existing Value</b> tab, click the <b>Search</b> button and select this Run Control from the list.</p> <p>After you have entered a name for the Run Control, click the <b>Add</b> button.</p> 



Step	Action
7.	On the <b>Group Creation Staging Entries</b> page, click the <b>Run</b> button to open the <b>Process Scheduler Request</b> page. <div style="text-align: center; margin-top: 10px;">  </div>

# Process Document

## Group Create\_Group Report\_Enroll Deposit



PeopleSoft. Home Worklist Add to Favorites Sign out

New Window | Help | Customize Page **Saved**

**Process Scheduler Request**

User ID: 0020625 Run Control ID: GroupCreate

Server Name: [dropdown] Run Date: 09/06/2007 [calendar icon]

Recurrence: [dropdown] Run Time: 11:45:06AM [Reset to Current Date/Time]

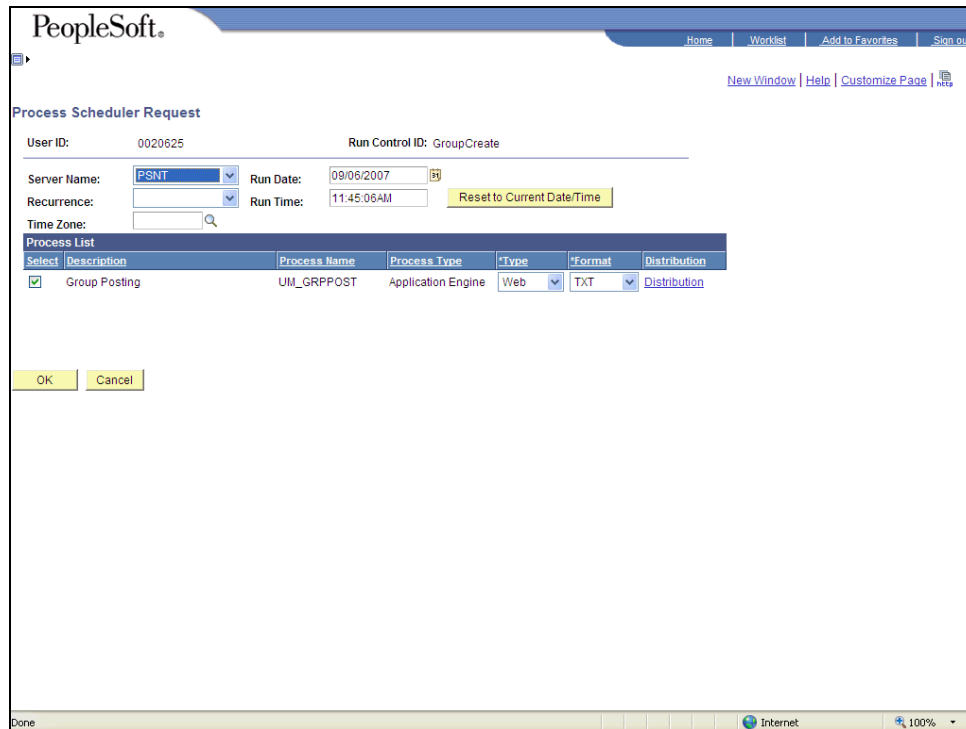
Time Zone: [dropdown]


Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Group Posting	UM_GRPPOST	Application Engine	Web	TXT	Distribution

OK Cancel

Done Internet 100%

Step	Action
8.	<p>Use the <b>Process Scheduler Request</b> page to enter, update, or view general process parameters, such as server name and process output format.</p> <p>You must select a <i>Server Name</i> to identify the server on which to run the process. If you use the same Run Control ID for subsequent processes, the server name that you used last will default in this field.</p> <p>Click on the drop-down arrow in the <i>Server Name</i> field and select <b>PSNT</b>.</p>



PeopleSoft. Home Worklet Add to Favorites Sign out  
[New Window](#) | [Help](#) | [Customize Page](#) | 

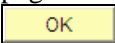
**Process Scheduler Request**  
 User ID: 0020625 Run Control ID: GroupCreate

Server Name: PSNT Run Date: 09/06/2007  
 Recurrence: Run Time: 11:45:06AM [Reset to Current Date/Time](#)  
 Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Group Posting	UM_GRPPOST	Application Engine	Web	TXT	Distribution

[OK](#) [Cancel](#)

Done Internet 100%

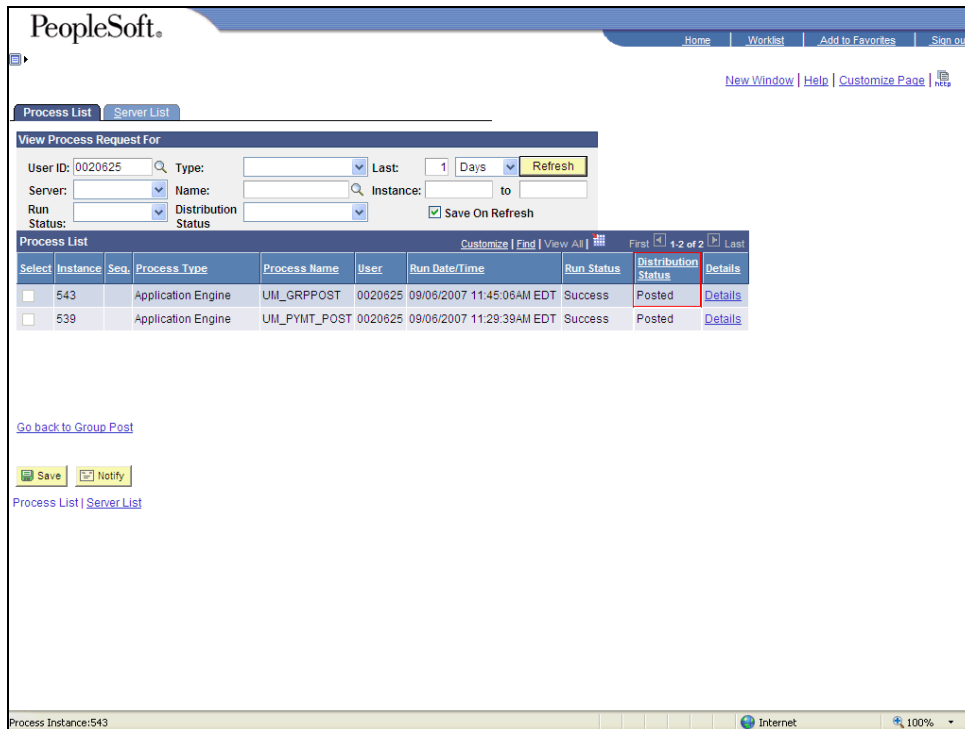
Step	Action
9.	Click the <b>OK</b> button to start the process and return to the <b>Group Creation Staging</b> page. 

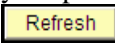
# Process Document

## Group Create\_Group Report\_Enroll Deposit



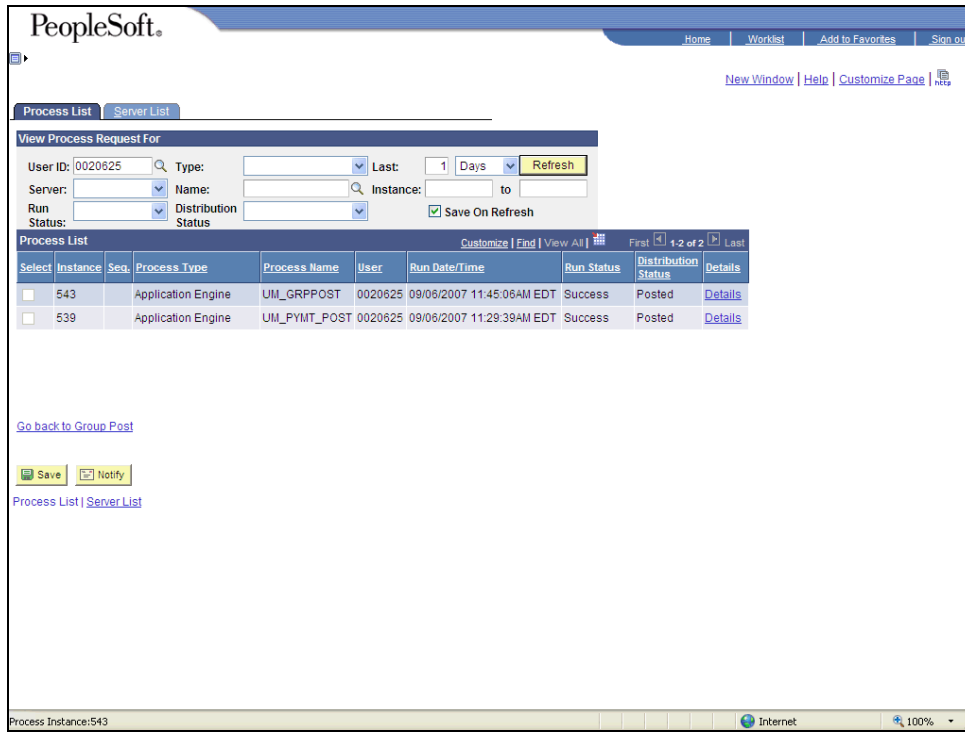
Step	Action
10.	<p>Notice that your report has been assigned a <b><i>Process Instance</i></b> number. This indicates that the process has been submitted to Process Scheduler.</p> <p>It is a good idea to make a note of the Process Instance number for process monitoring.</p> <p>Click the <b>Process Monitor</b> link to open the <b>Process List</b> page..</p> <p><a href="#">Process Monitor</a></p>



Step	Action
11.	On the <b>Process List</b> page, click the <b>Refresh</b> button until the <b>Distribution Status</b> for your process shows <i>Posted</i> . 

# Process Document

## Group Create\_Group Report\_Enroll Deposit



Step	Action
12.	Click the <b>Go back to Group Post</b> link to return to the <b>Group Creation</b> page. <a href="#">Go back to Group Post</a>



PeopleSoft. Home | Worklist | Add to Favorites | Sign out  
[New Window](#) | [Help](#) | [Customize Page](#) |

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

### Group Creation Staging Entries

This process will gather all the information in the Group Creation Staging tables and only select those entries associated to your operator id. You can view the results in the Student Financials - Group Processing menu selection.

After the execution of the posting program, return to this page to see the group id(s) created for each business unit and group.

Group Post Entries

Business Unit	Group Type	Group Id
1 UMS03	A	Application Fee Payment 000000000000016
2 UMS03	A	Application Fee Payment 000000000000017
3 UMS04	A	Application Fee Payment 000000000000002

[Group Summary Report](#)  
[Group Detail Report](#)

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

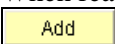
Process Instance:543 Internet 100%

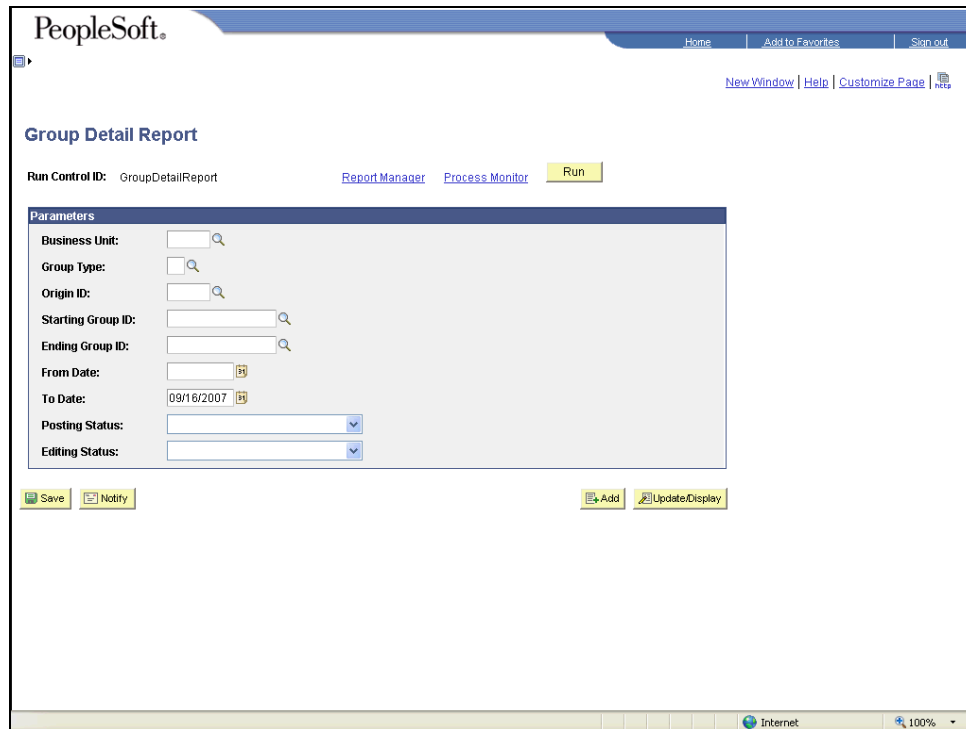
Step	Action
13.	In the <i>Group Post Entries</i> section, click on <b>Group Detail Report</b> to start the report process. <a href="#">Group Detail Report</a>


# Process Document

## Group Create\_Group Report\_Enroll Deposit



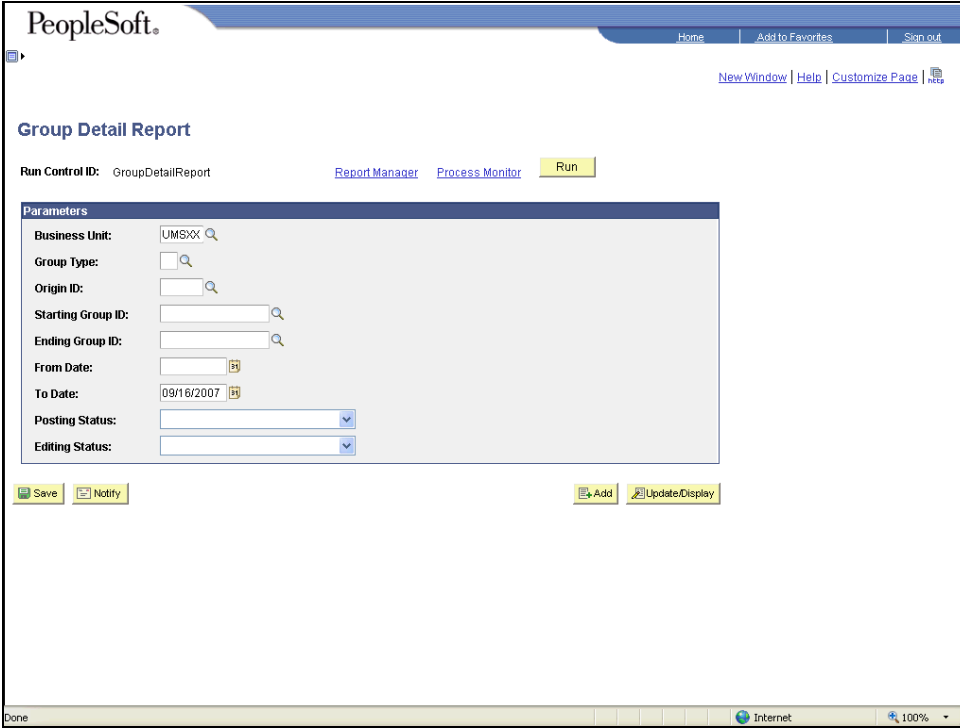
Step	Action
14.	<p>If you haven't already created one, you will need to create a <b>Run Control ID</b> for the <i>Group Detail Report</i> process. Refer to the previous instructions about creating a Run Control ID.</p> <p>When ready, click the <b>Add</b> button.</p> 




Step	Action
15.	On the <b>Group Detail Report</b> page you will enter the parameters for your report.  Enter or lookup and select the <i>Business Unit</i> . 

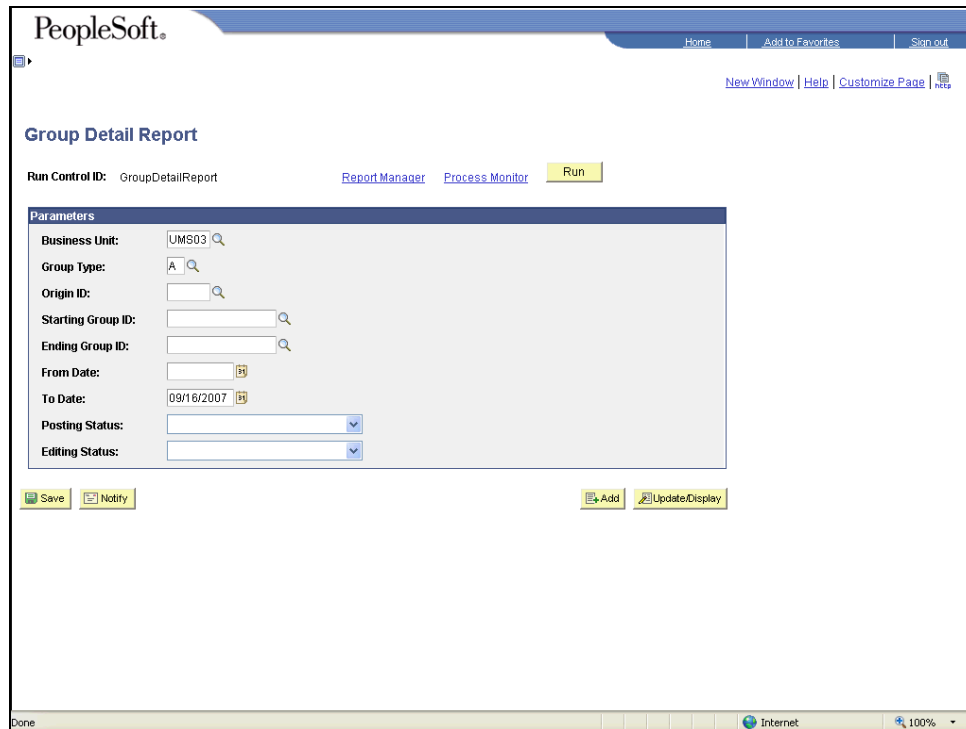
# Process Document

## Group Create\_Group Report\_Enroll Deposit



The screenshot shows the PeopleSoft Group Detail Report interface. At the top, there is a navigation bar with 'Home', 'Add to Favorites', and 'Sign out' links. Below this, there are links for 'New Window', 'Help', 'Customize Page', and a printer icon. The main heading is 'Group Detail Report'. Underneath, the 'Run Control ID' is 'GroupDetailReport', and there are links for 'Report Manager' and 'Process Monitor', along with a yellow 'Run' button. A 'Parameters' section contains the following fields: 'Business Unit' (UMSXX), 'Group Type' (with a lookup icon), 'Origin ID', 'Starting Group ID', 'Ending Group ID', 'From Date', 'To Date' (09/16/2007), 'Posting Status', and 'Editing Status'. At the bottom of the parameters section, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. The browser status bar at the bottom shows 'Done', 'Internet', and '100%' zoom.


Step	Action
16.	Click on the <b>Group Type</b> Lookup button and select the appropriate Group Type for the Enrollment Deposit payment. 



The screenshot shows the PeopleSoft Group Detail Report interface. At the top, there is a navigation bar with 'Home', 'Add to Favorites', and 'Sign out'. Below this, there are links for 'New Window', 'Help', 'Customize Page', and a printer icon. The main title is 'Group Detail Report'. Underneath, it shows 'Run Control ID: GroupDetailReport' and buttons for 'Report Manager', 'Process Monitor', and 'Run'. A 'Parameters' section contains the following fields:

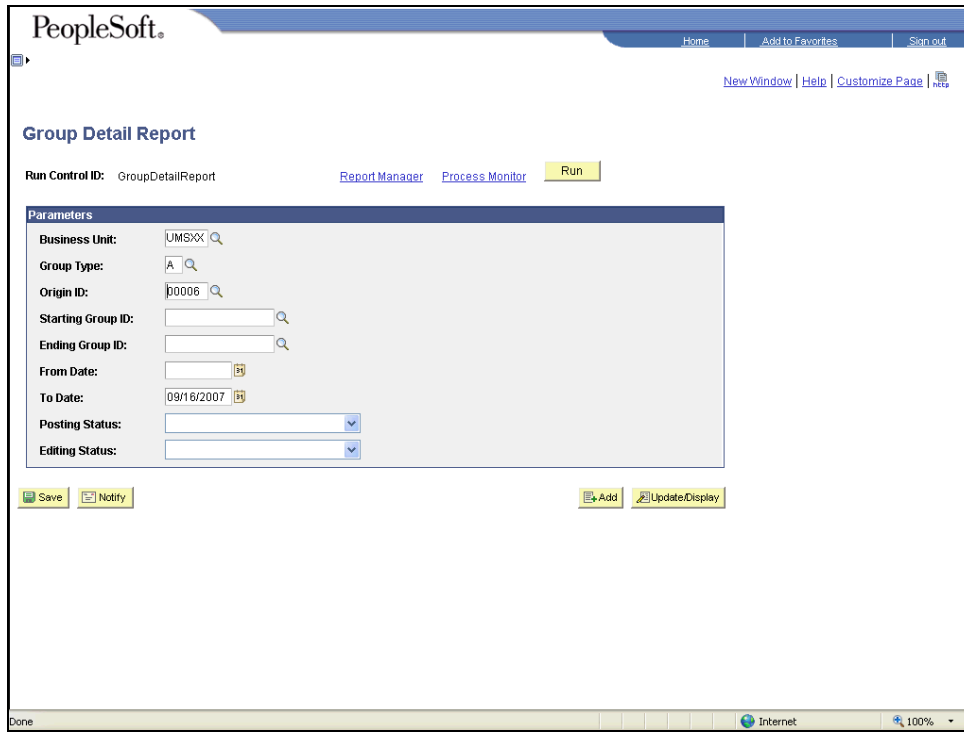
- Business Unit: UMS03 (with a search icon)
- Group Type: A (with a search icon)
- Origin ID: (with a search icon)
- Starting Group ID: (with a search icon)
- Ending Group ID: (with a search icon)
- From Date: (with a calendar icon)
- To Date: 09/16/2007 (with a calendar icon)
- Posting Status: (dropdown menu)
- Editing Status: (dropdown menu)

At the bottom of the parameters section, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. The browser status bar at the bottom shows 'Done', 'Internet', and '100%' zoom.


Step	Action
17.	Click the Look up <b>Origin ID</b> button to look up and select the appropriate Origin ID. 

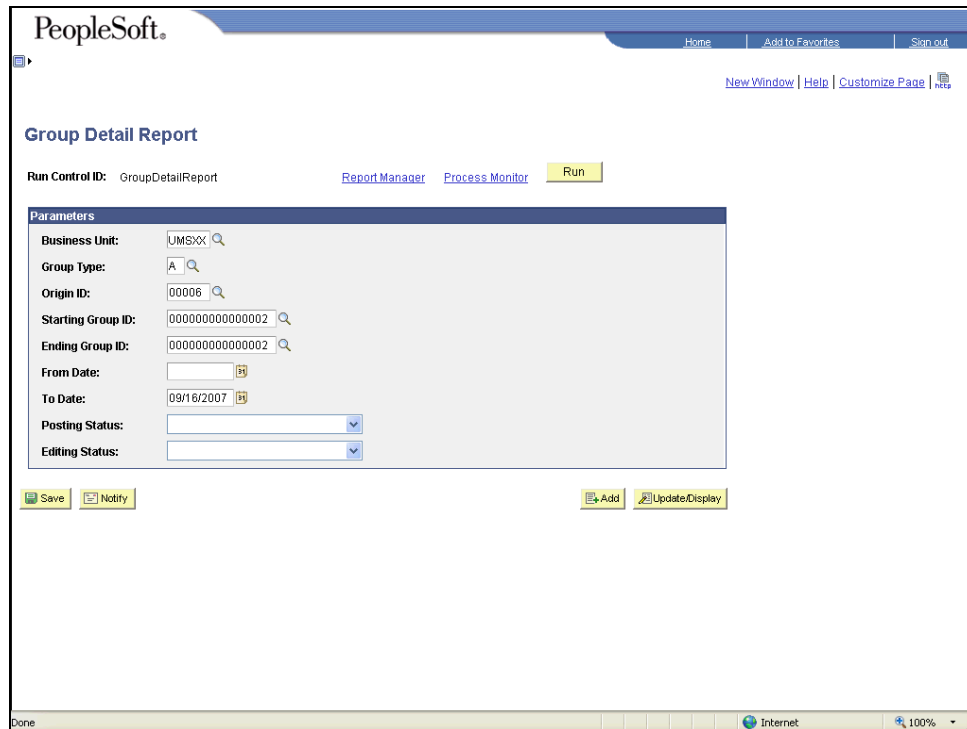
# Process Document

## Group Create\_Group Report\_Enroll Deposit



The screenshot shows the PeopleSoft Group Detail Report interface. At the top, there is a navigation bar with 'Home', 'Add to Favorites', and 'Sign out' links. Below this, there are links for 'New Window', 'Help', 'Customize Page', and a printer icon. The main title is 'Group Detail Report'. Underneath, it shows 'Run Control ID: GroupDetailReport' and buttons for 'Report Manager', 'Process Monitor', and 'Run'. A 'Parameters' section contains several input fields: 'Business Unit' (UMSXX), 'Group Type' (A), 'Origin ID' (00006), 'Starting Group ID', 'Ending Group ID', 'From Date', 'To Date' (09/16/2007), 'Posting Status', and 'Editing Status'. At the bottom of the parameters section, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. The browser status bar at the bottom shows 'Done', 'Internet', and '100%' zoom.

Step	Action
18.	Click the Look up <b>Starting Group ID</b> button to look up and select the row that contains <i>today's date</i> and your <i>User ID</i> . Click on the row to select it. 



The screenshot shows the PeopleSoft Group Detail Report interface. At the top, there is a navigation bar with 'Home', 'Add to Favorites', and 'Sign out' links. Below this, there are links for 'New Window', 'Help', 'Customize Page', and a printer icon. The main title is 'Group Detail Report'. Underneath, it shows 'Run Control ID: GroupDetailReport' and buttons for 'Report Manager', 'Process Monitor', and 'Run'. A 'Parameters' section contains the following fields:

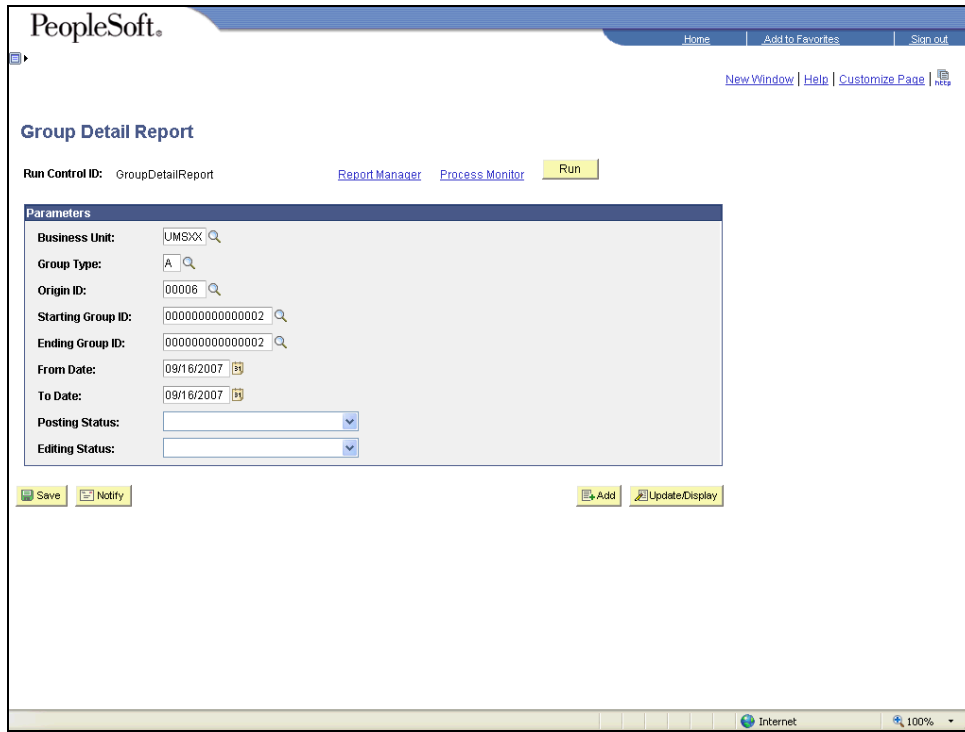
- Business Unit: UMSXX
- Group Type: A
- Origin ID: 00006
- Starting Group ID: 0000000000000002
- Ending Group ID: 0000000000000002
- From Date: (empty)
- To Date: 09/16/2007
- Posting Status: (dropdown menu)
- Editing Status: (dropdown menu)

At the bottom of the parameters section, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. The browser status bar at the bottom shows 'Done', 'Internet', and '100%' zoom.

Step	Action
19.	Enter today's date as the <b>From Date</b> .  Leave the remaining fields blank.

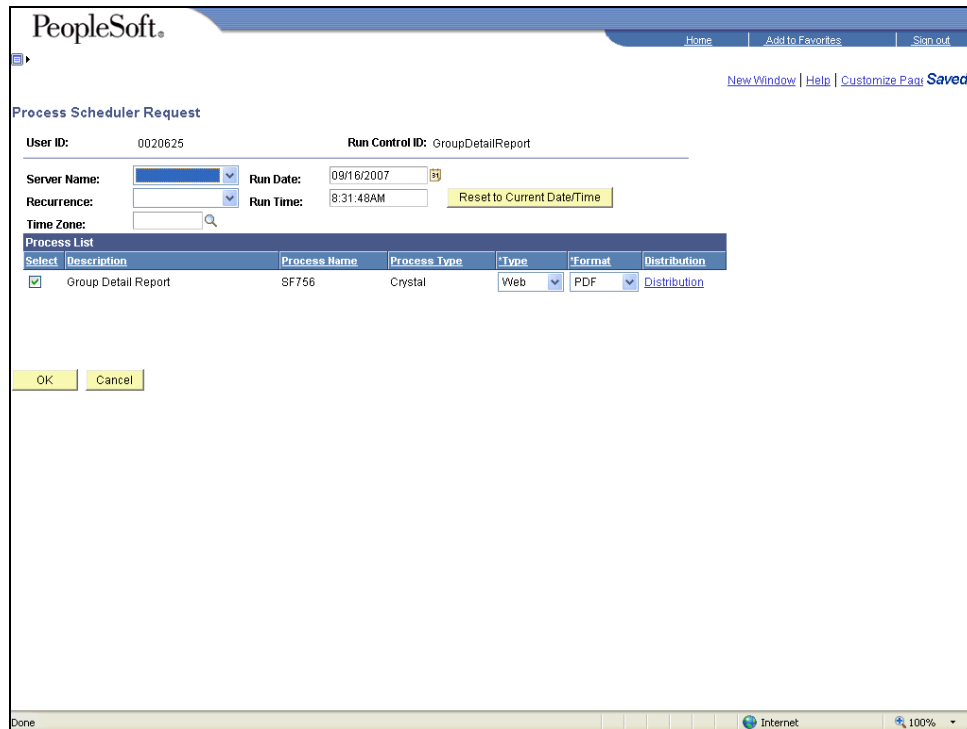
# Process Document

## Group Create\_Group Report\_Enroll Deposit



The screenshot shows the PeopleSoft Group Detail Report interface. At the top, there is a navigation bar with 'Home', 'Add to Favorites', and 'Sign out' links. Below this, the page title is 'Group Detail Report'. A 'Run Control ID' field is set to 'GroupDetailReport', with links for 'Report Manager' and 'Process Monitor', and a yellow 'Run' button. A 'Parameters' section contains several input fields: 'Business Unit' (UMSXX), 'Group Type' (A), 'Origin ID' (00006), 'Starting Group ID' (0000000000000002), 'Ending Group ID' (0000000000000002), 'From Date' (09/16/2007), and 'To Date' (09/16/2007). There are also dropdown menus for 'Posting Status' and 'Editing Status'. At the bottom of the parameters section, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'. The browser's status bar at the bottom indicates 'Internet' and '100%' zoom.

Step	Action
20.	Click the <b>Run</b> button to open the <b>Process Scheduler Request</b> page. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Run</div>



PeopleSoft. Home Add to Favorites Sign out  
[New Window](#) | [Help](#) | [Customize Page](#) **Saved**

**Process Scheduler Request**  
 User ID: 0020625 Run Control ID: GroupDetailReport

Server Name: [Dropdown] Run Date: 09/16/2007  
 Recurrence: [Dropdown] Run Time: 8:31:48AM [Reset to Current Date/Time](#)  
 Time Zone: [Search]

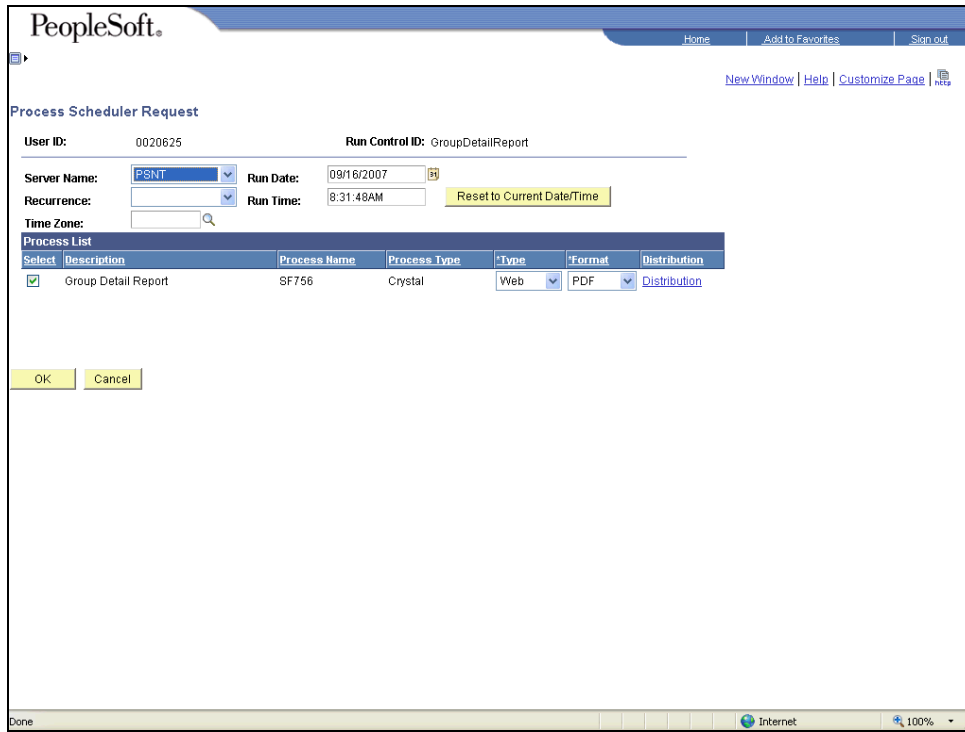
Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Group Detail Report	SF756	Crystal	Web	PDF	Distribution

[OK](#) [Cancel](#)

Step	Action
21.	On the <b>Process Scheduler Request</b> page, click on the drop-down arrow in the <b>Server Name</b> field and select <b>PSNT</b> .

# Process Document

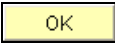
## Group Create\_Group Report\_Enroll Deposit

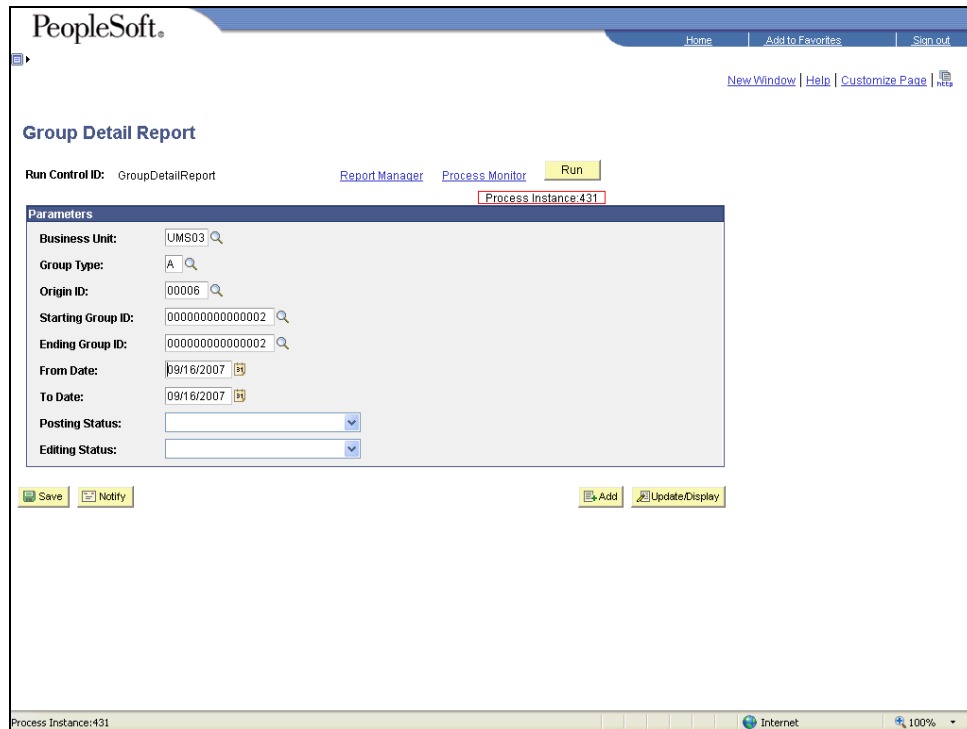



The screenshot shows the 'Process Scheduler Request' dialog box in PeopleSoft. It includes fields for 'User ID' (0020625) and 'Run Control ID' (GroupDetailReport). There are dropdown menus for 'Server Name' (PSNT) and 'Recurrence', and date/time pickers for 'Run Date' (09/16/2007) and 'Run Time' (8:31:48AM). A 'Time Zone' field is also present. Below these fields is a 'Process List' table with columns for 'Select', 'Description', 'Process Name', 'Process Type', 'Type', 'Format', and 'Distribution'. One row is selected, showing 'Group Detail Report' with process name 'SF756', type 'Crystal', and format 'PDF'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Group Detail Report	SF756	Crystal	Web	PDF	Distribution

Step	Action
22.	Click the <b>OK</b> button to return to the <b>Group Detail Report</b> page.












PeopleSoft. Home Add to Favorites Sign out  
[New Window](#) | [Help](#) | [Customize Page](#) | 

**Group Detail Report**

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

Process Instance: 431

**Parameters**

Business Unit: UMS03    
 Group Type: A    
 Origin ID: 00006    
 Starting Group ID: 0000000000000002    
 Ending Group ID: 0000000000000002    
 From Date: 09/16/2007    
 To Date: 09/16/2007    
 Posting Status:   
 Editing Status:

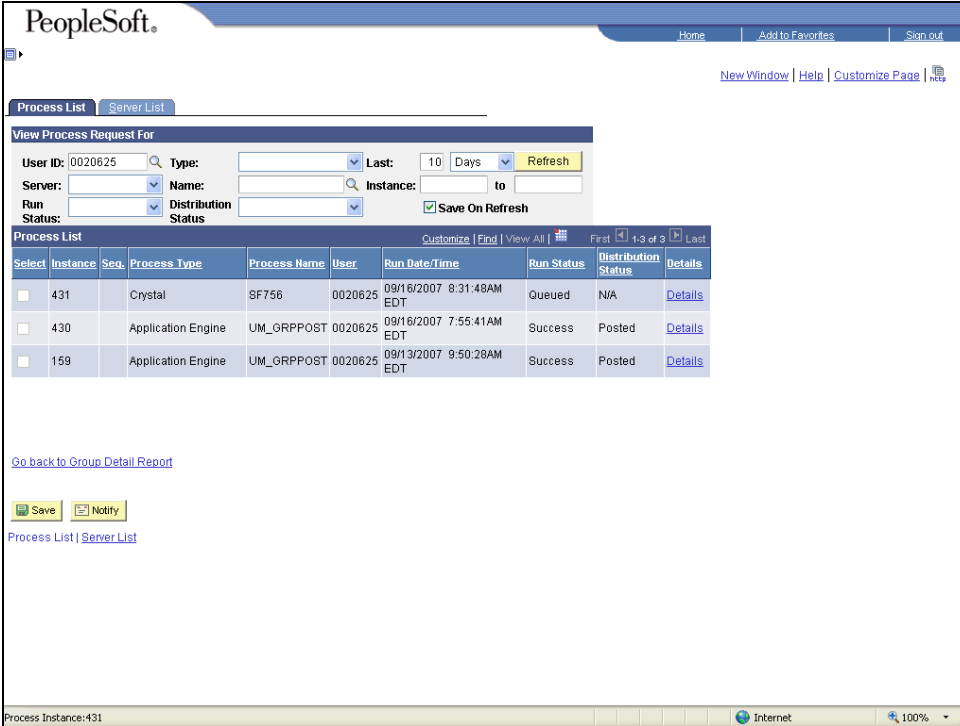
[Save](#) [Notify](#) [Add](#) [Update/Display](#)

Process Instance: 431 Internet 100%


Step	Action
23.	On the <b>Group Detail Report</b> page, note the <i>Process Instance number</i> and click the <a href="#">Process Monitor</a> link to open the <b>Process List</b> page.. <a href="#">Process Monitor</a>

# Process Document

## Group Create\_Group Report\_Enroll Deposit



PeopleSoft. Home Add to Favorites Sign out

New Window | Help | Customize Page | 

Process List Server List

View Process Request For

User ID: 0020625 Type: Last: 10 Days Refresh

Server: Name: Instance: to

Run Status: Distribution Status Save On Refresh



Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	431		Crystal	SF756	0020625	09/16/2007 8:31:48AM EDT	Queued	N/A	<a href="#">Details</a>
<input type="checkbox"/>	430		Application Engine	UM_GRPPOST	0020625	09/16/2007 7:55:41AM EDT	Success	Posted	<a href="#">Details</a>
<input type="checkbox"/>	159		Application Engine	UM_GRPPOST	0020625	09/13/2007 9:50:28AM EDT	Success	Posted	<a href="#">Details</a>

Go back to Group Detail Report

Save Notify

Process List | Server List

Process Instance: 431

Step	Action
24.	<p>On the <b>Process List</b> page, locate your process in the listing.</p> <p>Click the <b>Refresh</b> button until the <b>Distribution Status</b> for your process shows <i>Posted</i>.</p> <p></p>
25.	<p>Click the <b>Details</b> link for your process to open the <b>Process Details</b> page.</p> <p></p>



PeopleSoft. Home Add to Favorites Sign out  
[New Window](#) | [Help](#) | [Customize Page](#) |

**Process Detail**

Process	
<b>Instance:</b> 431	<b>Type:</b> Crystal
<b>Name:</b> SF756	<b>Description:</b> Group Detail Report
<b>Run Status:</b> Success	<b>Distribution Status:</b> Posted

Run	Update Process
<b>Run Control ID:</b> GroupDetailReport <b>Location:</b> Server <b>Server:</b> PSNT <b>Recurrence:</b>	<input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input type="radio"/> Delete Request <input type="radio"/> Restart Request

Date/Time	Actions
<b>Request Created On:</b> 09/16/2007 8:32:10AM EDT	<a href="#">Parameters</a> Transfer
<b>Run Anytime After:</b> 09/16/2007 8:31:48AM EDT	<a href="#">Message Log</a>
<b>Began Process At:</b> 09/16/2007 8:33:01AM EDT	Batch Timings
<b>Ended Process At:</b> 09/16/2007 8:33:11AM EDT	<a href="#">View Log/Trace</a>

OK Cancel

Process Instance:431 Internet 100%

Step	Action
26.	Click the <i>View Log/Trace</i> link to open the <i>View Log/Trace</i> page and access your report. <a href="#">View Log/Trace</a>

# Process Document

## Group Create\_Group Report\_Enroll Deposit



PeopleSoft. Home Add to Favorites Sign out

New Window | Help | Customize Page |

View Log/Trace

**Report**

Report ID: 431 Process Instance: 431 [Message Log](#)

Name: SF756 Process Type: Crystal

Run Status: Success

Group Detail Report

**Distribution Details**

Distribution Node: DEV Expiration Date: 09/26/2007

**File List**

Name	File Size (bytes)	Datetime Created
<a href="#">Message Log</a>	0	09/16/2007 8:33:11.000000AM EDT
<a href="#">SF756_431.PDF</a>	51,782	09/16/2007 8:33:11.000000AM EDT
<a href="#">PeopleSoft Trace File</a>	600	09/16/2007 8:33:11.000000AM EDT

**Distribute To**

Distribution ID Type	Distribution ID
User	0020625

Return

Process Instance: 431 Internet 100%

Step	Action
27.	Click the <b>PDF</b> file link in the <i>File List</i> section to open your report.
28.	<b>End of Procedure.</b>