

Version	1.0
Document Generation Date	11/5/2008
Date Modified	11/5/2008
Last Changed by	ASDS
Status	Draft

ISIR 2C Process

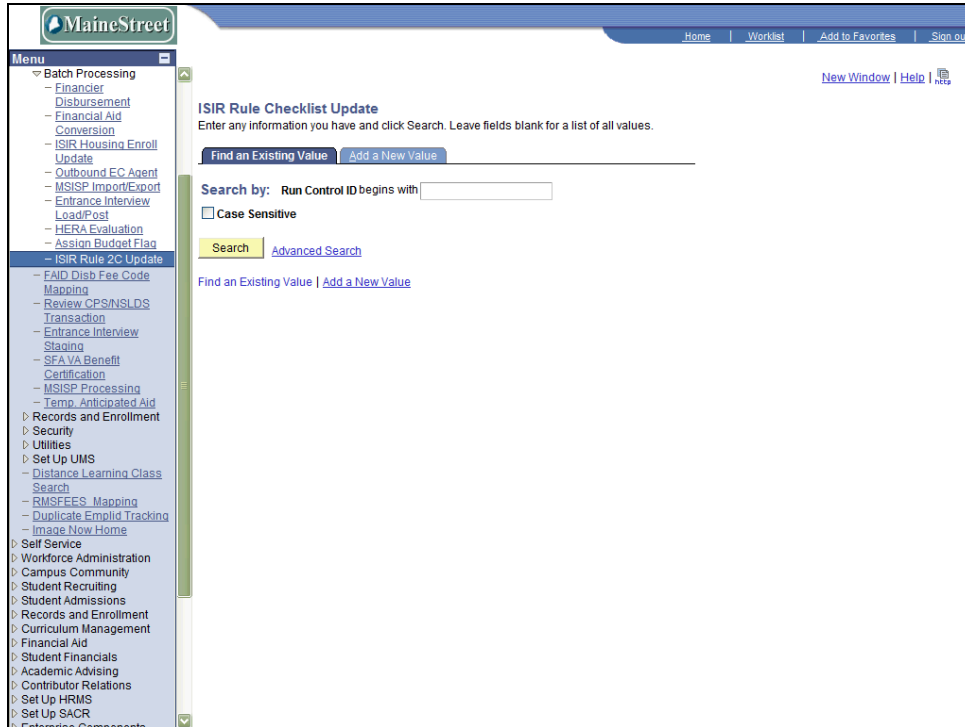
Concept

The ISIR 2C process is used to assign checklists and/or communications to students whose ISIRs meet certain criteria. For example, the ISIR 2C process can be used to find all the students requiring verification, and assign to them the appropriate checklists and missing items letters.

The process can be used in other contexts, where the student selection criteria use other records besides the ISIR. For example, the process may be used to identify students who need to complete an entrance interview.

Procedure


Step	Action
1.	Navigate: University of Maine Systems > Financial Aid > Batch Processing > ISIR Rule 2C Update.




Step	Action
2.	<p>You must use a Run Control ID for the process. Either select an existing one or create a new one.</p> <p>To create a new Run Control ID, click the Add a New Value tab.</p> <p>Add a New Value</p>



The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' with various categories like 'Batch Processing', 'Records and Enrollment', and 'Self Service'. The 'ISIR Rule Checklist Update' page is active, featuring a title bar with navigation links, a main content area with 'Find an Existing Value' and 'Add a New Value' buttons, a 'Run Control ID:' text input field, and an 'Add' button. There are also links for 'Find an Existing Value' and 'Add a New Value' below the input field.

Step	Action
3.	Enter a name for the new Run Control ID into the Run Control ID field.
4.	Click the Add button. 



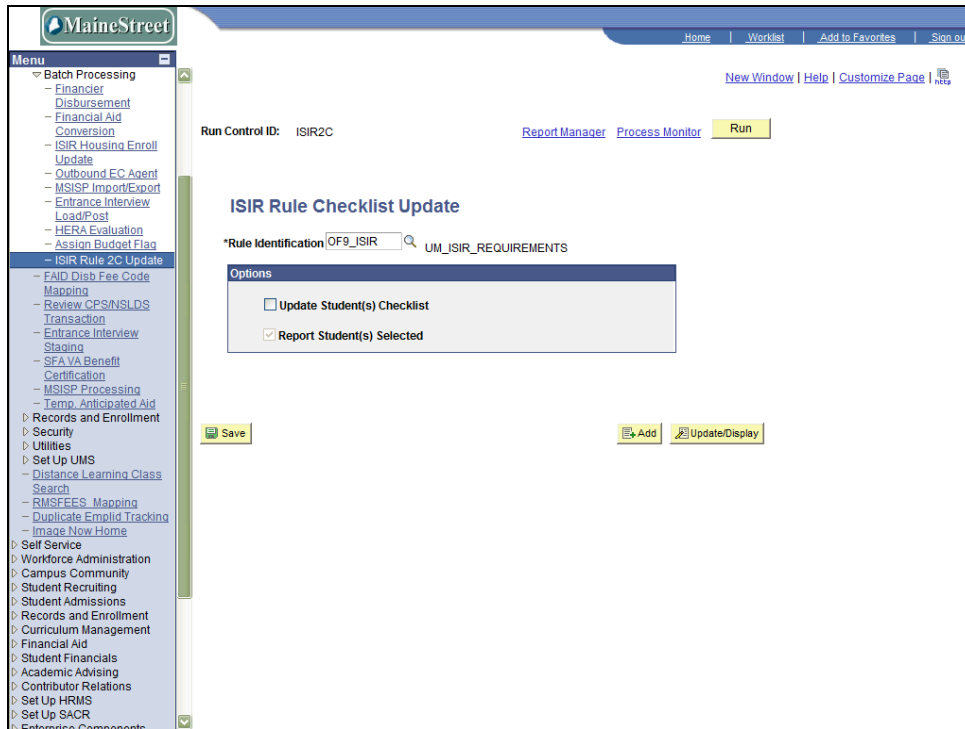
Step	Action
5.	Use this page to set parameters for the ISIR 2C process. Select the Rule to apply. Click the Look up Rule Identification button. 



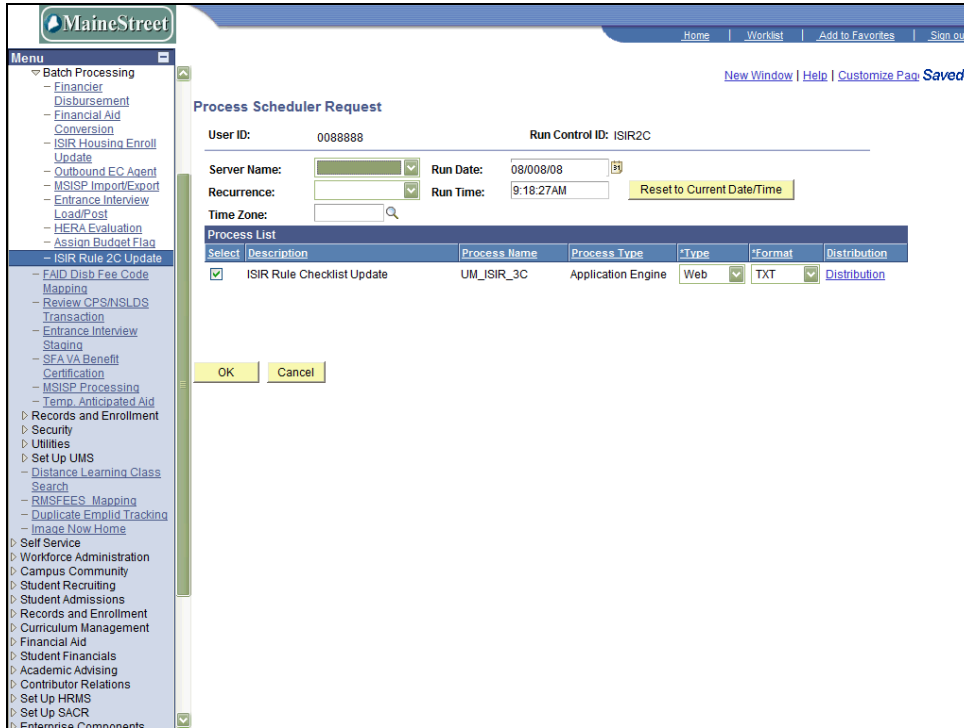
The screenshot shows the 'MaineStreet' application interface. On the left is a navigation menu with categories like 'Batch Processing', 'Records and Enrollment', and 'Self Service'. The main area is titled 'Look Up Rule Identification'. It features a search box with the text 'Search by: Rule Identification begins with' and a search button. Below the search box is a table of search results.

Rule Identification	Description
AF9_DLH	UMA TEST
AF9_ISIR	UMA ISIR Requirements
FF9_ISIR	UMF ISIR Requirements
IF9_ISIR	UMPI ISIR Requirements
KF9_ISIR	UMFK ISIR Requirements
MF9_ISIR	UMM ISIR Requirements
OF9_ISIR	UM ISIR REQUIREMENTS
PF9_I_TST	TEST
PF9_ISIR	USM ISIR Requirements 2C
R2PKU01_09	Ready to Package UMS01 2009
UM_DH_SAF	SAP status FAIL, with ISIR

Step	Action
6.	The name of each rule used for financial aid processing begins with the campus identifier letter followed by "F" for financial aid. <div style="border: 1px solid black; padding: 2px; display: inline-block;">OF9 ISIR UM ISIR REQUIREMENTS</div>



Step	Action
7.	<p>This process can be run in report only mode, or it can assign checklists and communications in addition to generating a report.</p> <p>To run in report only mode, leave the Update Student(s) Checklist option unchecked. (The Report Student(s) Selected checkbox will always be active; you cannot turn it off.)</p> <p>To assign checklists and communications, the Update Student(s) Checklist option should be checked.</p> <div data-bbox="370 1402 657 1438" style="border: 1px solid black; padding: 2px;"> <input type="checkbox"/> Update Student(s) Checklist </div>
8.	<p>Click the Run button.</p> <div data-bbox="370 1486 472 1522" style="border: 1px solid black; padding: 2px; display: inline-block;"> Run </div>



Process Scheduler Request

User ID: 0088888 Run Control ID: ISIR2C

Server Name: Run Date: 08/008/08

Recurrence: Run Time: 9:18:27AM

Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	ISIR Rule Checklist Update	UM_ISIR_3C	Application Engine	Web	TXT	Distribution

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

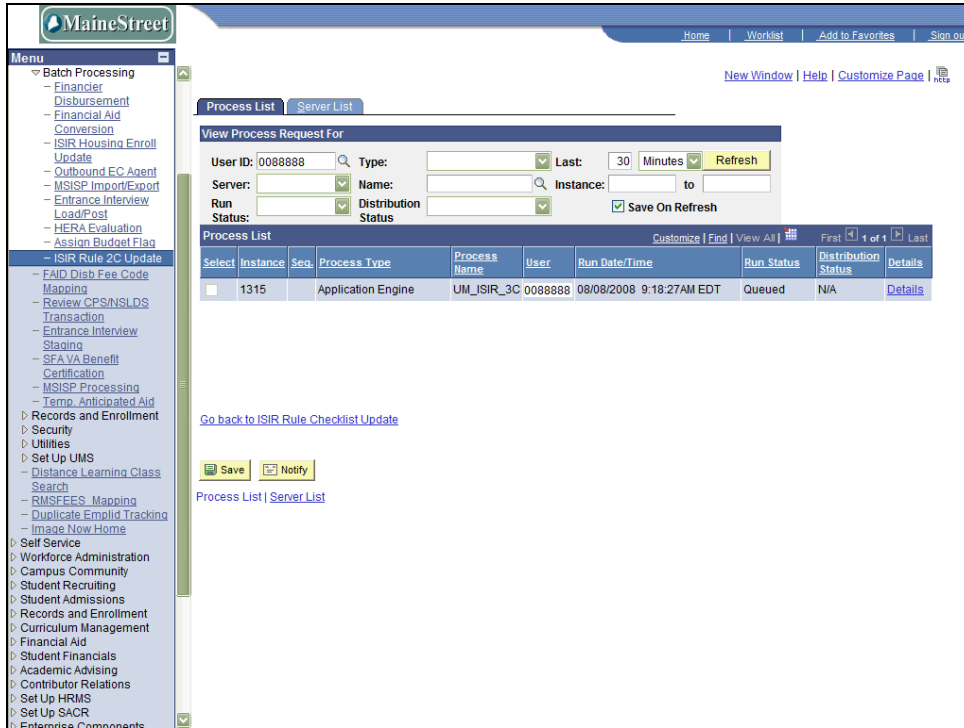
Process Document

Financial Aid: ISIR 2C Process-080808






The screenshot shows the 'MaineStreet' web application. The left-hand navigation menu is expanded to show 'ISIR Rule 2C Update'. The main content area displays the 'ISIR Rule Checklist Update' page. At the top, it shows 'Run Control ID: ISIR2C' and a 'Run' button. Below this, there is a search bar with the text '*Rule Identification OF9_ISIR' and 'UM_ISIR_REQUIREMENTS'. An 'Options' box contains two checked items: 'Update Student(s) Checklist' and 'Report Student(s) Selected'. At the bottom of the page, there are 'Save', 'Add', and 'Update/Display' buttons.

Step	Action
10.	Click the Process Monitor link. Process Monitor



The screenshot shows the 'MaineStreet' web application. On the left is a navigation menu with categories like 'Batch Processing', 'Records and Enrollment', 'Security', 'Set Up UMS', 'Self Service', and 'Workforce Administration'. The main content area is titled 'Process List' and includes a 'View Process Request For' section with fields for 'User ID' (0088888), 'Type', 'Last' (30 Minutes), 'Server', 'Name', 'Instance', and 'Distribution Status'. There are 'Refresh' and 'Save On Refresh' buttons. Below this is a table with columns: 'Select', 'Instance', 'Seq', 'Process Type', 'Process Name', 'User', 'Run Date/Time', 'Run Status', 'Distribution Status', and 'Details'. One row is visible with Instance 1315, Process Type 'Application Engine', Process Name 'UM_ISIR_3C', User '0088888', Run Date/Time '08/08/2008 9:18:27AM EDT', Run Status 'Queued', and Distribution Status 'N/A'. There are also 'Save' and 'Notify' buttons and a link to 'Go back to ISIR Rule Checklist Update'.

Step	Action
11.	Click Refresh from time to time until the Run Status is <i>Success</i> and Distribution Status is <i>Posted</i> . 
12.	Once the first part of the process (the student selection) is complete, a second process appears to create the report. Click Refresh until the Run Status of the report is <i>Success</i> and Distribution Status is <i>Posted</i> . 
13.	To view messages from each part of the process, click the corresponding Details link. Click Details on the second row. 

Process Document

Financial Aid: ISIR 2C Process-080808



The screenshot shows the 'MaineStreet' application interface. On the left is a 'Menu' tree with 'ISIR Rule 2C Update' selected. The main area displays 'Process Detail' for 'UM_ISIR_3C'. The process is an 'Application Engine' with a 'Run Status' of 'Success' and 'Distribution Status' of 'Posted'. It includes a 'Run' section with control ID 'ISIR2C', location 'Server', and server 'PSUNX'. A 'Date/Time' table shows the process was created, run, and ended on 08/08/2008. An 'Update Process' section offers actions like 'Hold Request', 'Queue Request', 'Cancel Request', 'Delete Request', and 'Restart Request'. 'Actions' include 'Parameters', 'Transfer', 'Message Log', 'View Locks', 'Batch Timings', and 'View Log/Trace'. 'OK' and 'Cancel' buttons are at the bottom.

Step	Action
14.	Click the View Log/Trace link. View Log/Trace



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Batch Processing', 'Records and Enrollment', and 'Security'. The main content area is titled 'View Log/Trace' and shows details for a report with ID 1177. The report name is 'UM_ISIR_3C' and its status is 'Success'. Below this, there is a 'Distribution Details' section showing 'Distribution Node: DEV' and 'Expiration Date: 08/18/2008'. A 'File List' table is displayed with the following data:

Name	File Size (bytes)	Datime Created
Redirected Terminal Output	19,570	08/08/2008 9:19:43.000000AM EDT
Application Engine Trace File	14,117	08/08/2008 9:19:43.000000AM EDT

Below the file list is a 'Distribute To' section with a table:

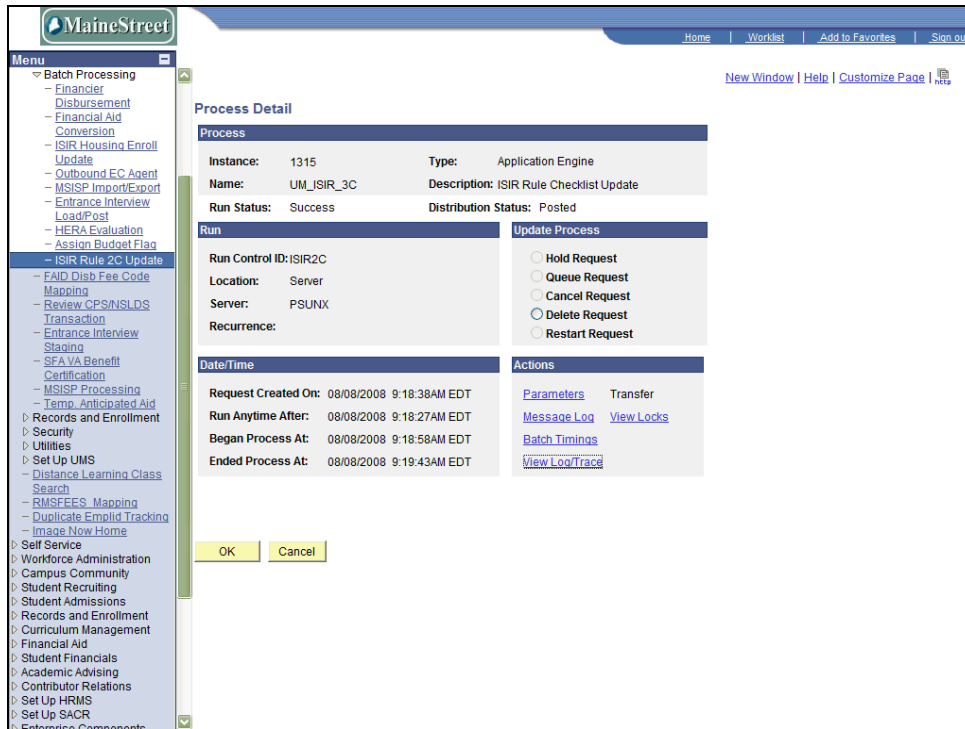
Distribution ID Type	Distribution ID
User	0088888

A 'Return' button is visible at the bottom left of the main content area.

Step	Action
15.	Click " Redirected Terminal Output ". Redirected Terminal Output
16.	The Redirected Terminal Output page opens in a new window. Review it for any errors.

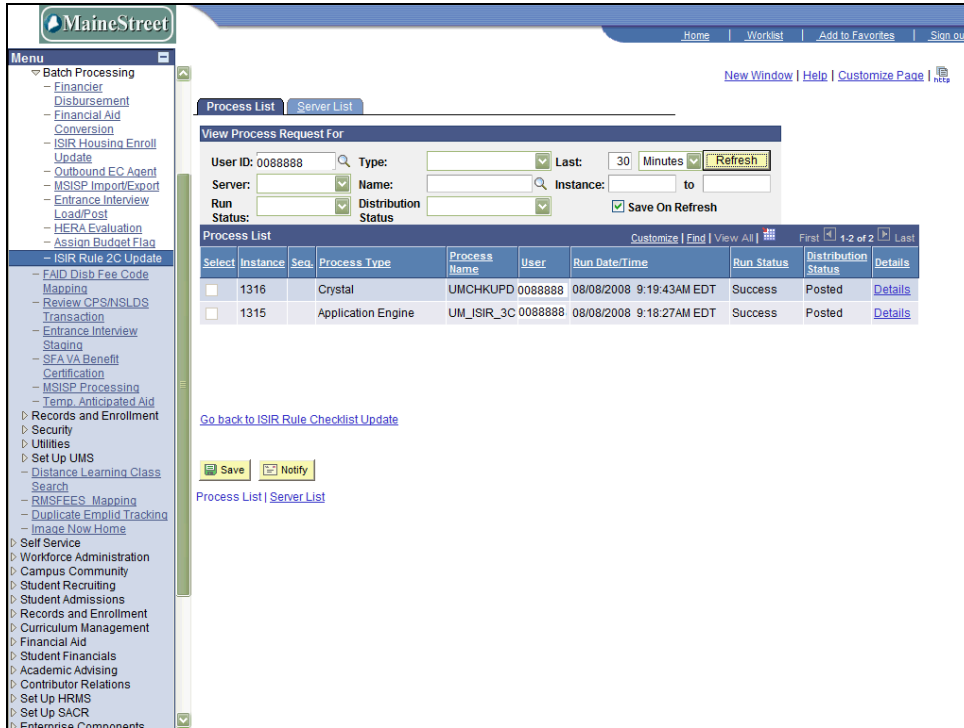
Process Document

Financial Aid: ISIR 2C Process-080808



The screenshot shows the 'MaineStreet' application interface. On the left is a 'Menu' tree with 'ISIR Rule 2C Update' selected. The main area displays 'Process Detail' for 'UM_ISIR_3C'. It includes sections for 'Process' (Instance: 1315, Type: Application Engine, Name: UM_ISIR_3C, Description: ISIR Rule Checklist Update, Run Status: Success, Distribution Status: Posted), 'Run' (Run Control ID: ISIR2C, Location: Server, Server: PSUNX, Recurrence:), 'Update Process' (radio buttons for Hold, Queue, Cancel, Delete, Restart Request), 'Date/Time' (Request Created On: 08/08/2008 9:18:38AM EDT, Run Anytime After: 08/08/2008 9:18:27AM EDT, Began Process At: 08/08/2008 9:18:58AM EDT, Ended Process At: 08/08/2008 9:19:43AM EDT), and 'Actions' (Parameters, Transfer, Message Log, View Locks, Batch Timings, View Log/Trace). At the bottom are 'OK' and 'Cancel' buttons.

Step	Action
17.	Click the OK button. <div style="text-align: center; border: 1px solid black; width: 60px; margin: 5px auto; background-color: #ffff00;">OK</div>



The screenshot shows the 'MaineStreet' web application. On the left is a navigation menu with categories like 'Batch Processing', 'Records and Enrollment', 'Security', 'Set Up UMS', 'Self Service', and 'Workforce Administration'. The main content area is titled 'Process List' and 'Server List'. It features a 'View Process Request For' section with search criteria for User ID (0088888), Type, Last (30 Minutes), and a Refresh button. Below this is a table of process instances:

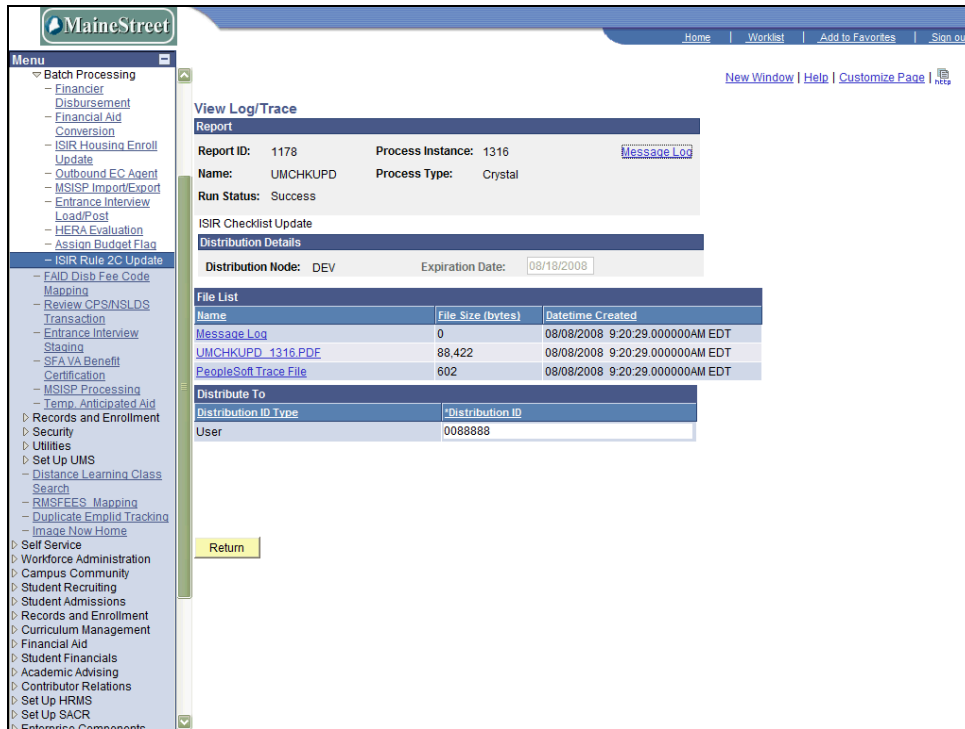
Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1316		Crystal	UMCHKUPD	0088888	08/08/2008 9:19:43AM EDT	Success	Posted	Details
<input type="checkbox"/>	1315		Application Engine	UM_ISIR_3C	0088888	08/08/2008 9:18:27AM EDT	Success	Posted	Details

Below the table are 'Save' and 'Notify' buttons, and a link: 'Go back to ISIR Rule Checklist Update'. At the bottom of the main content area are 'Process List' and 'Server List' links.

Step	Action
18.	To view the report, click the Details link on the topmost process row. Details
19.	Click the View Log/Trace link. View Log/Trace

Process Document

Financial Aid: ISIR 2C Process-080808



View Log/Trace

Report

Report ID: 1178 Process Instance: 1316 [Message Log](#)

Name: UMCHKUPD Process Type: Crystal

Run Status: Success

ISIR Checklist Update

Distribution Details

Distribution Node: DEV Expiration Date: 08/18/2008

File List

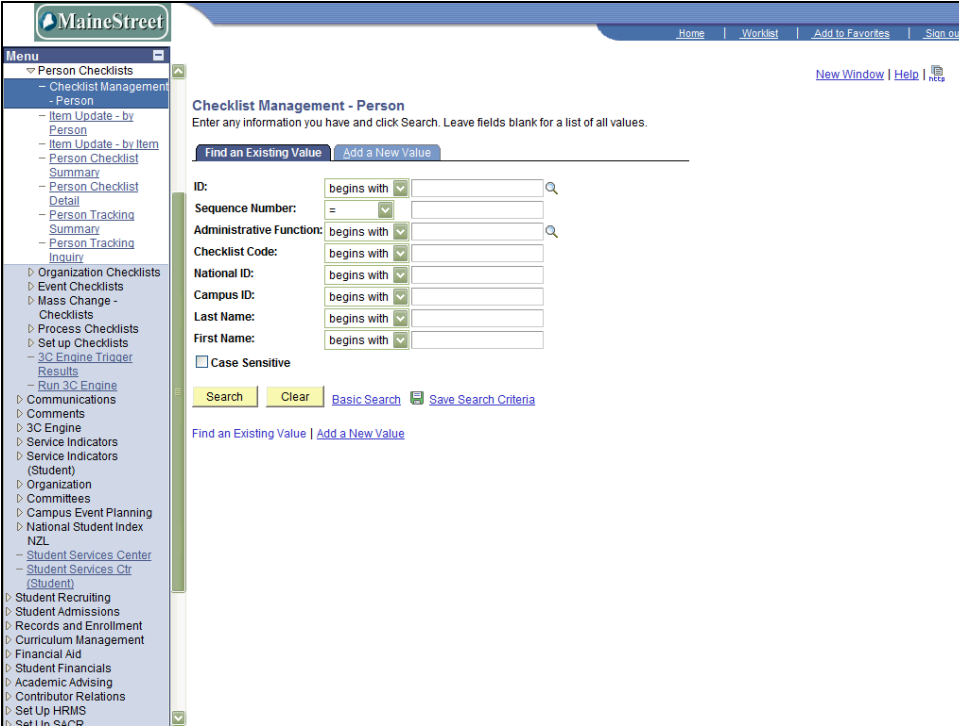
Name	File Size (bytes)	Datetime Created
Message Log	0	08/08/2008 9:20:29.000000AM EDT
UMCHKUPD_1316.PDF	88,422	08/08/2008 9:20:29.000000AM EDT
PeopleSoft Trace File	602	08/08/2008 9:20:29.000000AM EDT

Distribute To

Distribution ID Type	*Distribution ID
User	0088888

[Return](#)

Step	Action
20.	The report is in the PDF file. The report contains a list of students selected for each checklist item and/or communication assigned. UMCHKUPD_1316.PDF
21.	To verify that the checklist items have been correctly assigned to the students, navigate as follows: Campus Community > Checklists > Person Checklists > Checklist Management - Person.



MaineStreet Home | Worklist | Add to Favorites | Sign out

Menu

- Person Checklists
 - Checklist Management - Person
 - Item Update - by Person
 - Item Update - by Item
 - Person Checklist Summary
 - Person Checklist Detail
 - Person Tracking Summary
 - Person Tracking Inquiry
 - Organization Checklists
 - Event Checklists
 - Mass Change - Checklists
 - Process Checklists
 - Set up Checklists
 - 3C Engine Trigger Results
 - Run 3C Engine
 - Communications
 - Comments
 - 3C Engine
 - Service Indicators
 - Service Indicators (Student)
 - Organization
 - Committees
 - Campus Event Planning
 - National Student Index
 - NZL
 - Student Services Center
 - Student Services Ctr (Student)
 - Student Recruiting
 - Student Admissions
 - Records and Enrollment
 - Curriculum Management
 - Financial Aid
 - Student Financials
 - Academic Advising
 - Contributor Relations
 - Set Up HRMS
 - Set Up SACB

Checklist Management - Person
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](#)

ID:

Sequence Number:

Administrative Function:

Checklist Code:

National ID:

Campus ID:

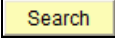
Last Name:

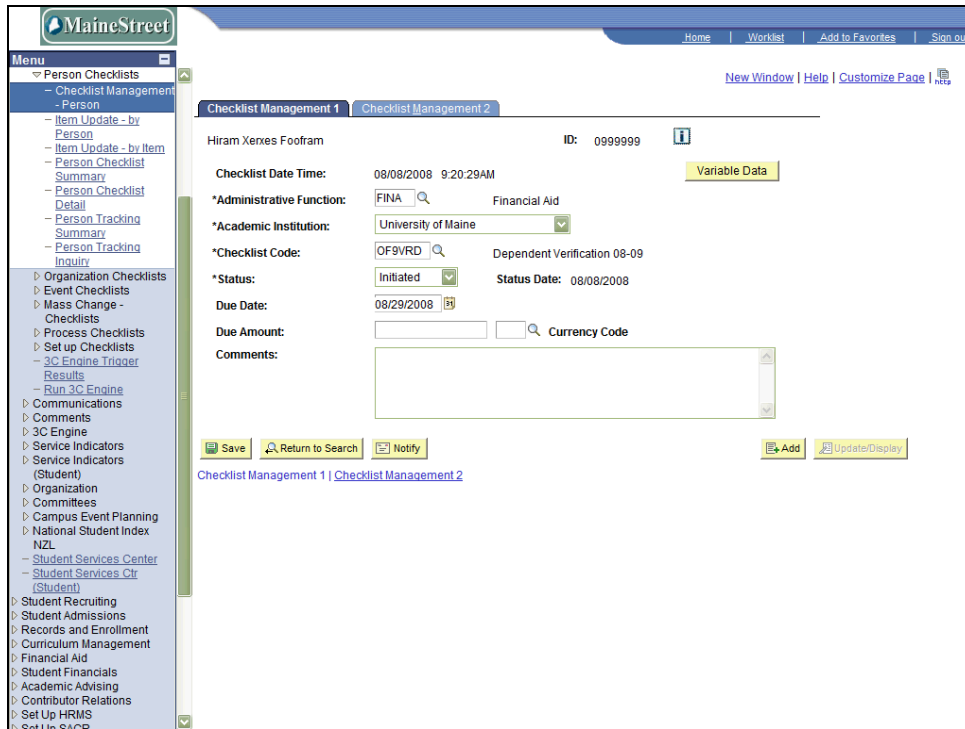
First Name:

Case Sensitive

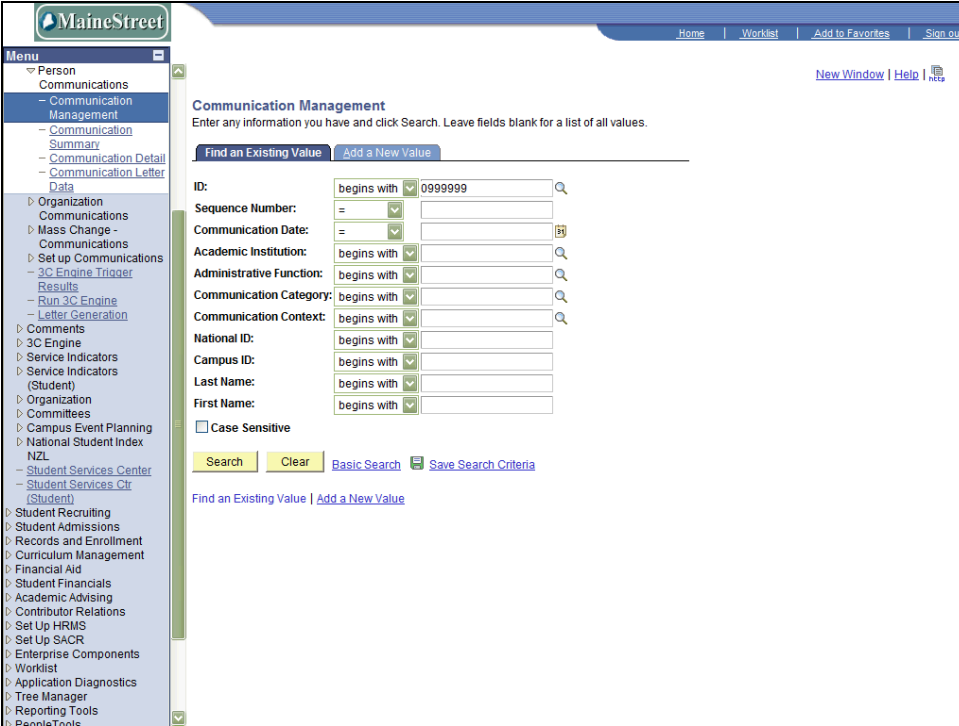
[Basic Search](#)

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

Step	Action
22.	Use the report generated by the ISIR Rule process to find the emplids of the students selected. Enter the emplid for one of the students in the report.
23.	If you want to narrow the search, enter the appropriate value in the Administrative Function field.
24.	Click the Search button. 



Step	Action
25.	<p>The Checklist Management 1 page contains information about the student and the checklist.</p> <p>To see and manage the individual checklist items, click the Checklist Management 2 tab.</p> <p>Checklist Management 2</p>
26.	<p>On the Checklist Management 2 page, you see each checklist item along with the id of the person who assigned the item to the student (in this case, the person who ran the ISIR 2C process).</p>
27.	<p>To verify that a communication has been assigned to the students processed by the ISIR 2C procedure, navigate: Campus Community > Communications > Person Communications > Communication Management - Person.</p>



MaineStreet Home | Worklist | Add to Favorites | Sign out

Menu

- Person
- Communications
 - Communication Management
 - Communication Summary
 - Communication Detail
 - Communication Letter Data
- Organization
 - Communications
 - Mass Change - Communications
 - Set up Communications
 - 3C Engine Trigger Results
 - Run 3C Engine Letter Generation
- Comments
- 3C Engine
 - Service Indicators
 - Service Indicators (Student)
- Organization
 - Committees
 - Campus Event Planning
 - National Student Index
 - NZL
 - Student Services Center
 - Student Services Ctr (Student)
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
 - Student Financials
 - Academic Advising
 - Contributor Relations
 - Set Up HRMS
 - Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- PeopleTools

Communication Management
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

ID: begins with 0999999

Sequence Number: =

Communication Date: =

Academic Institution: begins with

Administrative Function: begins with

Communication Category: begins with

Communication Context: begins with

National ID: begins with

Campus ID: begins with

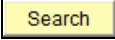
Last Name: begins with

First Name: begins with

Case Sensitive

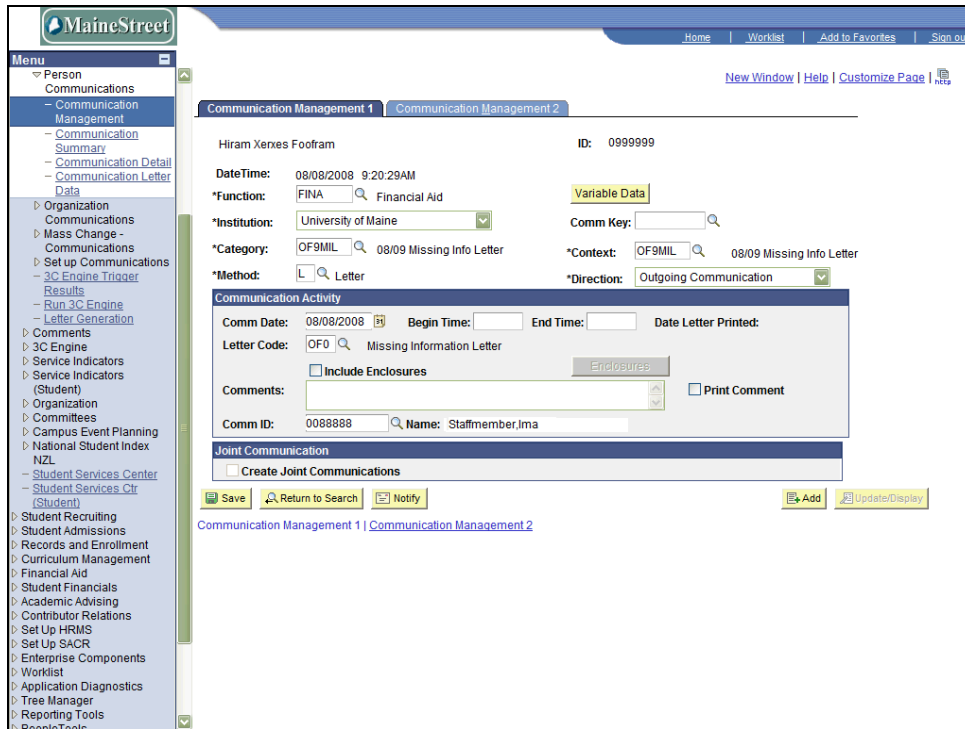
Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

Step	Action
28.	Enter search criteria such as student ID and Administrative Function.
29.	Click the Search button. 

Process Document

Financial Aid: ISIR 2C Process-080808



The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' with categories like 'Person', 'Communications', 'Organization', and 'Comments'. The main area is titled 'Communication Management 1' and 'Communication Management 2'. It displays details for a communication from 'Hiram Xerxes Foofram' (ID: 0999999) dated '08/08/2008 9:20:29AM'. Fields include 'Function' (FINA - Financial Aid), 'Institution' (University of Maine), 'Category' (OF9MIL - 08/09 Missing Info Letter), and 'Method' (Letter). Below this is a 'Communication Activity' section with 'Comm Date' (08/08/2008), 'Letter Code' (OF0 - Missing Information Letter), and a 'Comments' field. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

Step	Action
30.	The letter in this example has been assigned to the student, but not processed yet.
31.	End of Procedure.