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## **Importing A Federal Data File**

### **Concept**

Federal data files containing ISIR and NSLDS data are received by the Institution. When these are received they are usually stored on a personal computer or server in the FA office. Once received, the files must be made available to the central FA system for processing.

In this procedure, a file residing on the user's personal computer is uploaded to a staging area.

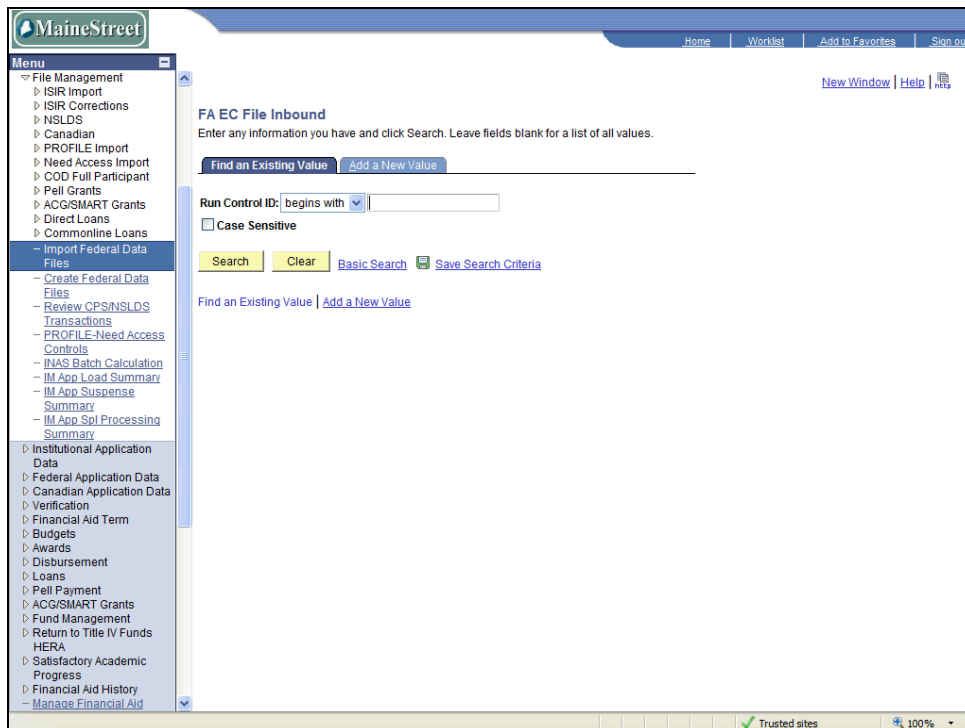
## Procedure

Importing ISIRs is a two-step process. The first step is to copy the file received from CPS onto the central server. The second step is to import the new file into the staging table. From the staging tables, the ISIRs will be loaded (refer to the documentation on Loading ISIRs and Suspense Management).

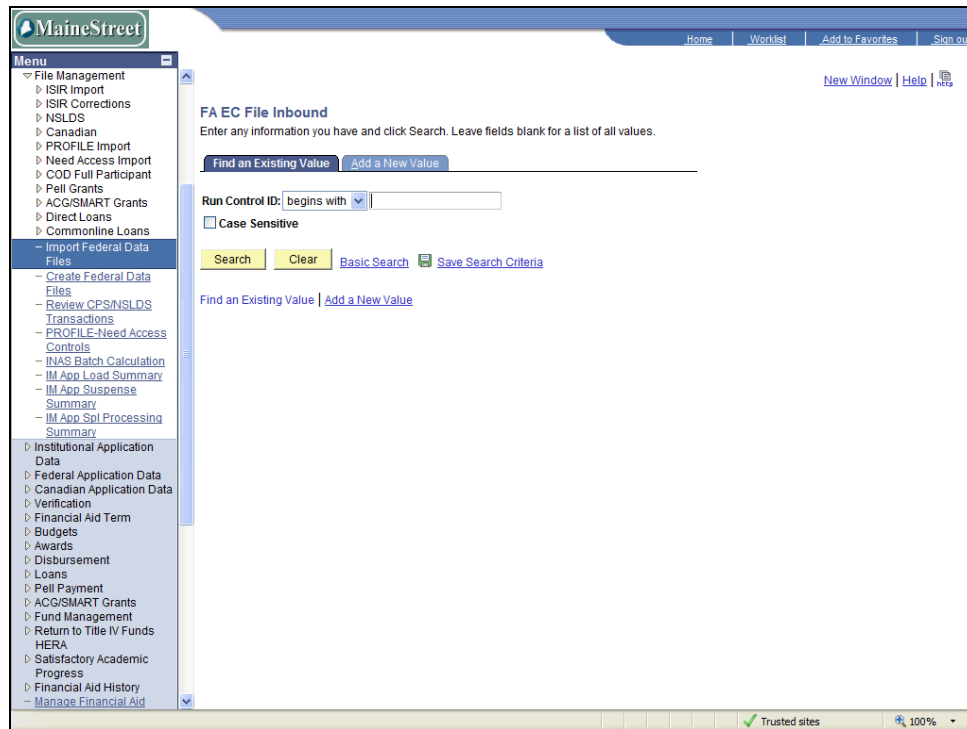
In this procedure, a file residing on the user's personal computer is copied to a receiving area on the system server.

A process is then run to import the file data into the ISIR staging tables, so the ISIRs are ready for loading.

Step	Action
1.	Navigate: <b>Financial Aid &gt; File Management &gt; Import Federal Data Files.</b>



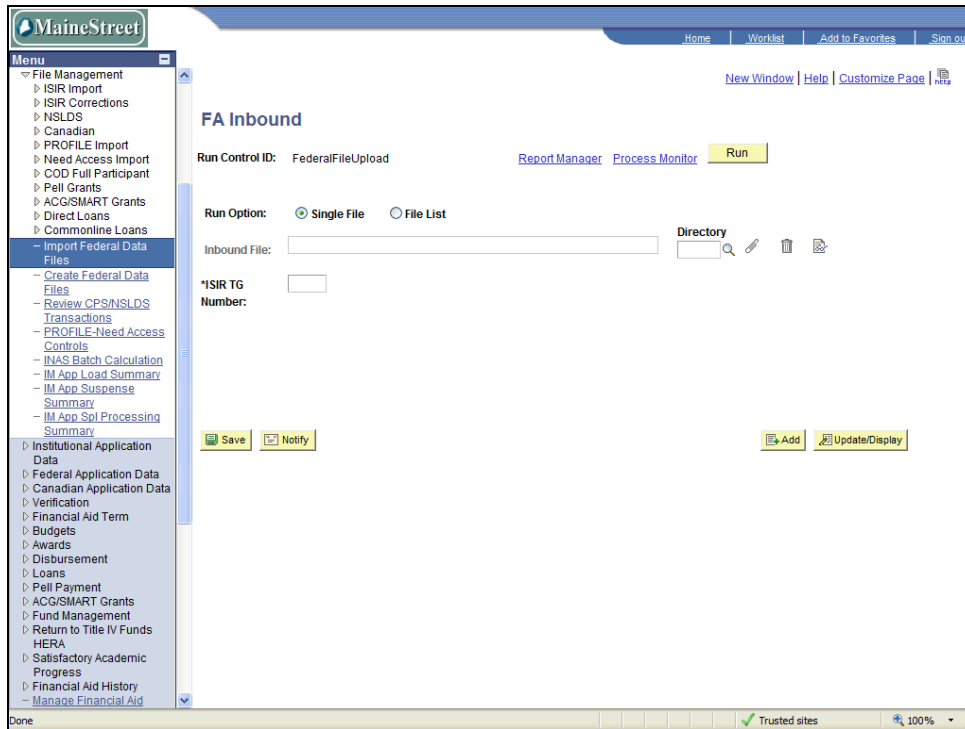
Step	Action
2.	<p>To run the file import process, you need a <b>Run Control ID</b>. The first time you run the process, you may wish to create a new Run Control ID specifically for this process. Use the <b>Add a New Value</b> tab to create the new ID.</p> <p>Once you have a Run Control ID created, the next time you run the process you can search for the Run Control ID using this page and the <b>Find an Existing Value</b> tab.</p>





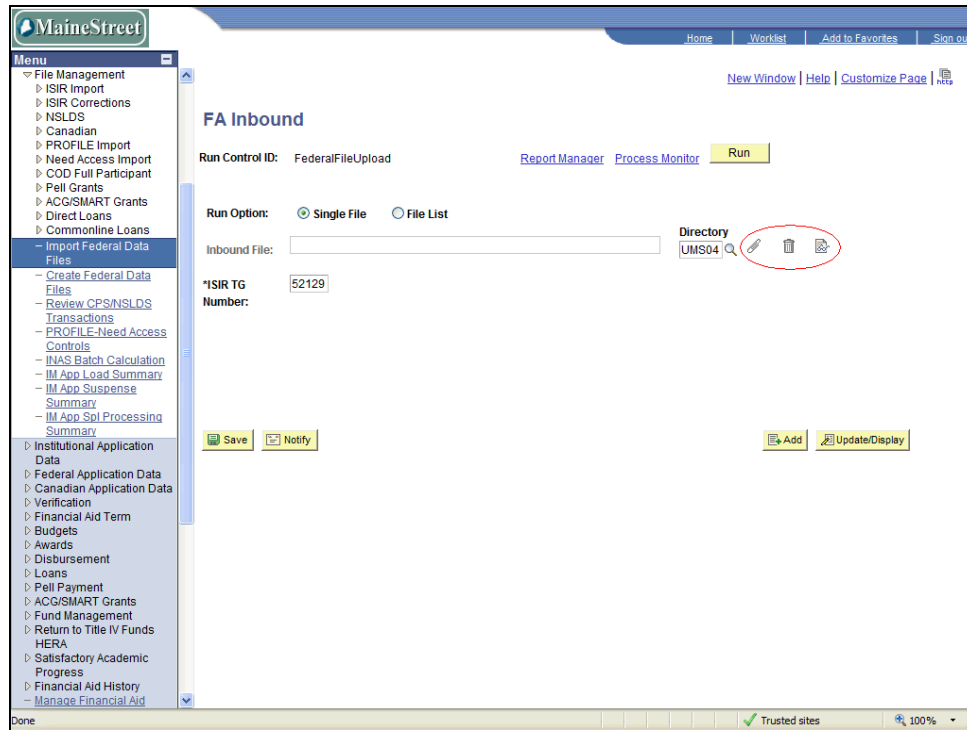
Step	Action
3.	<p>To create a new <b>Run Control ID</b> for this process, click the <b>Add a New Value</b> tab.</p> <p style="text-align: center;"><b>Add a New Value</b></p>
4.	<p>Type in a name for the new <b>Run Control ID</b>. Choose a name that reflects the process it will be used for. No blanks are allowed in the name.</p>
5.	<p>Click the <b>Add</b> button.</p> <p style="text-align: center;"><b>Add</b></p>
6.	<p>Enter the parameters for this process. There are two parameter fields: <b>ISIR TG Number</b> and <b>Directory</b>.</p>


# Process Document

## Financial Aid: Importing A Federal Data File-032608



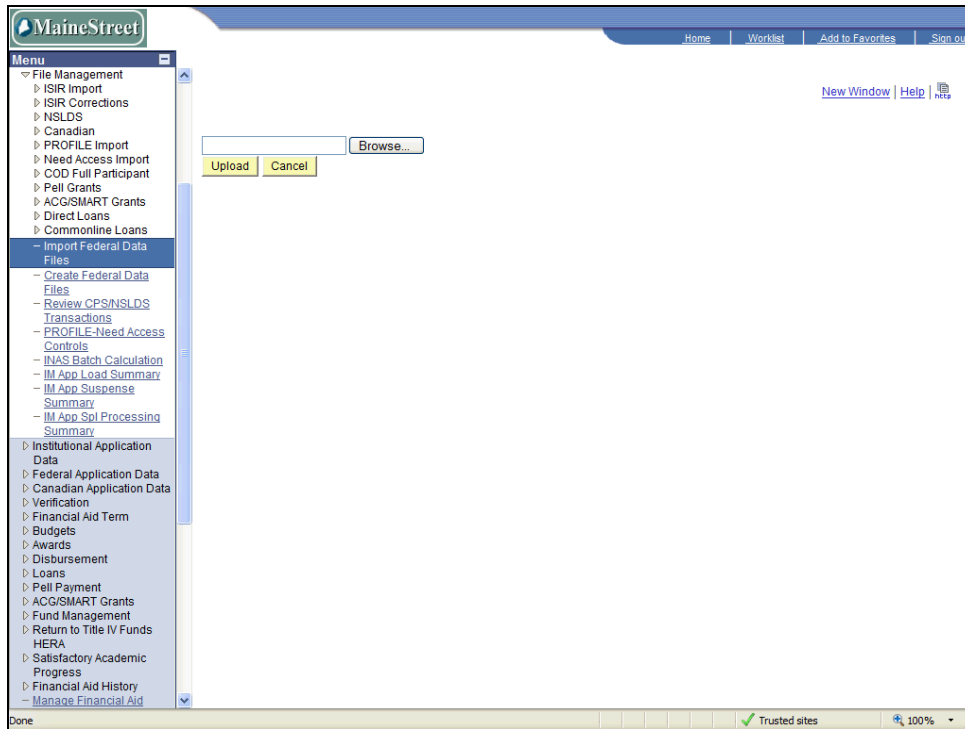
Step	Action
7.	Enter the TG5 number of your Institution into the <b>ISIR TG Number</b> field. Omit the letters "TG".
8.	The <b>Directory</b> corresponds to your Institution. To select the Directory, click the <b>Look up</b> button next to the <b>Directory</b> field. 
9.	Select your <b>Institution</b> from the list. 

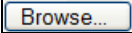


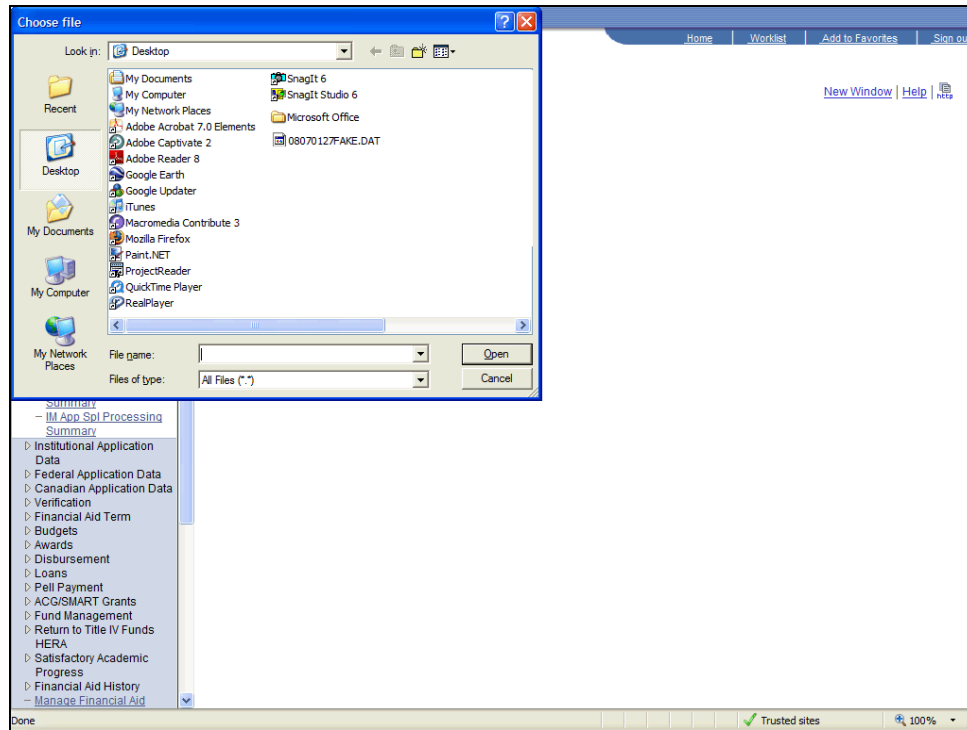
Step	Action
10.	<p>There are three buttons to the right of the <b>Directory</b> field: the <b>Add Attachment</b> (paperclip) button, the <b>Delete</b> (trashcan) button, and the <b>View Attachment</b> button.</p> <p>Use the <b>Add Attachment</b> button to select a file on your PC to copy to the server. Once the file is copied, use the <b>View</b> button to examine its contents to make sure you uploaded the correct file.</p> <p>Finally, if you made a mistake and uploaded the wrong file, use the <b>Delete</b> button to remove the file from the server.</p>
11.	<p>To select the file to upload click the <b>Add Attachment</b> button.</p> 

# Process Document

## Financial Aid: Importing A Federal Data File-032608



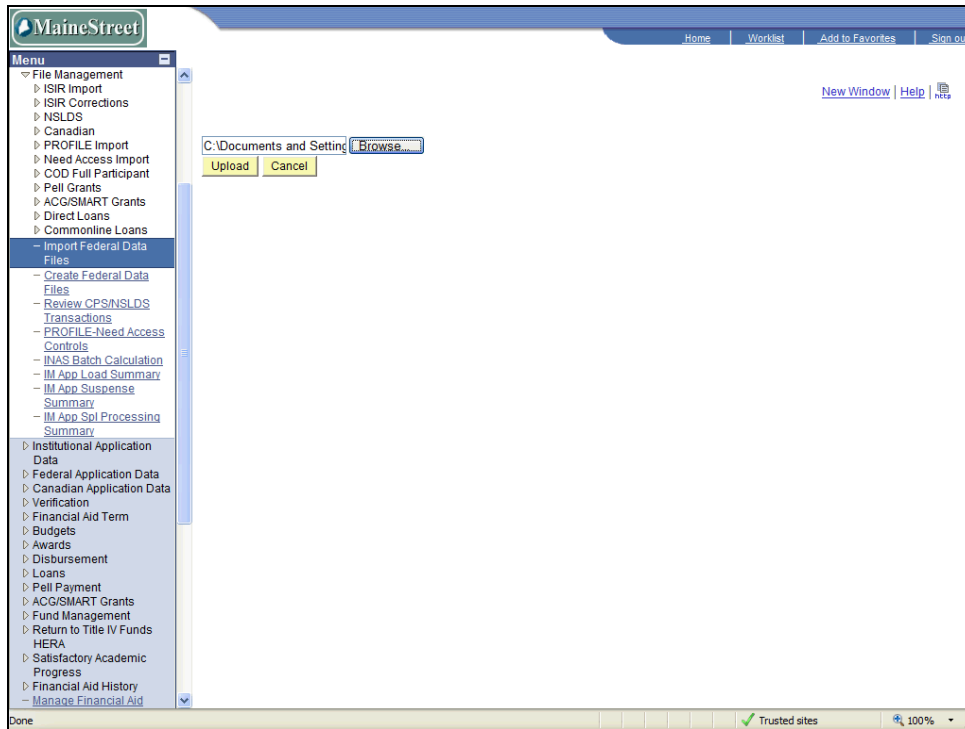
Step	Action
12.	Click the <b>Browse...</b> button to search your computer for the desired file. 




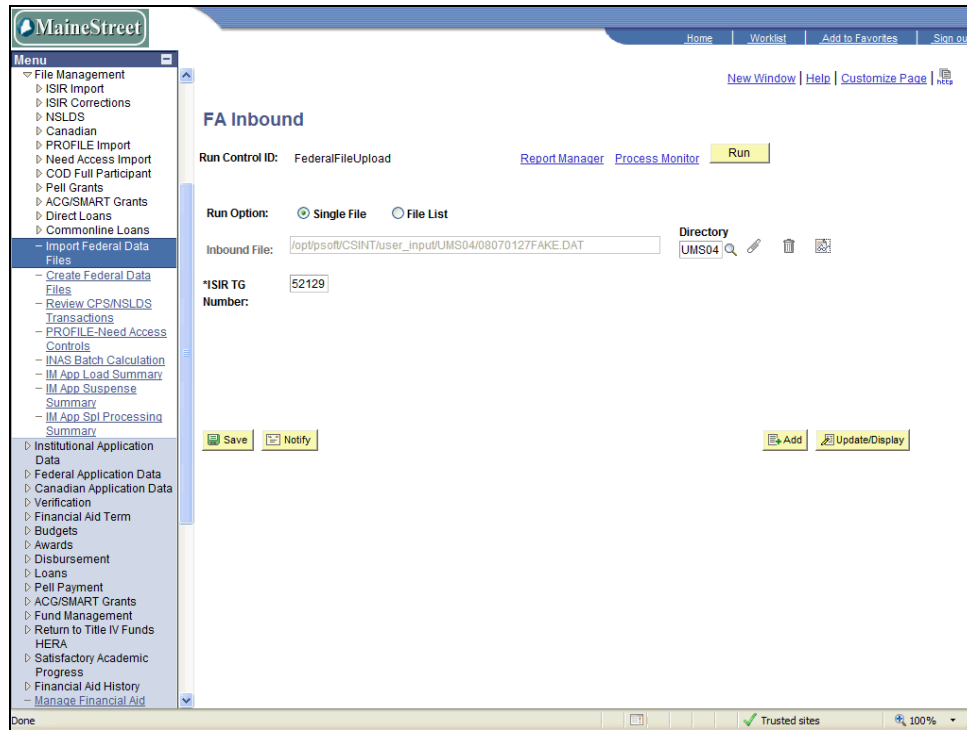
Step	Action
13.	Browse the files on your hard drive until you find the file you want to upload. Click the filename to highlight it and click the <b>Open</b> button.

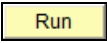
# Process Document

## Financial Aid: Importing A Federal Data File-032608



Step	Action
14.	Click the <b>Upload</b> button. 
15.	You can look at the file using the <b>View Attachment</b> button, and you can delete the file from the server (not from your computer), using the <b>Delete</b> (trashcan) button.  To view the file, click the <b>View Attachment</b> button. The file is displayed in a new window (not shown here for privacy reasons).



Step	Action
16.	To complete the upload by moving the data into the ISIR staging table, click the <b>Run</b> button.
	

# Process Document

## Financial Aid: Importing A Federal Data File-032608



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**Process Scheduler Request**

User ID: 0099999      Run Control ID: FederalFileUpload

Server Name:       Run Date: 08/31/2007

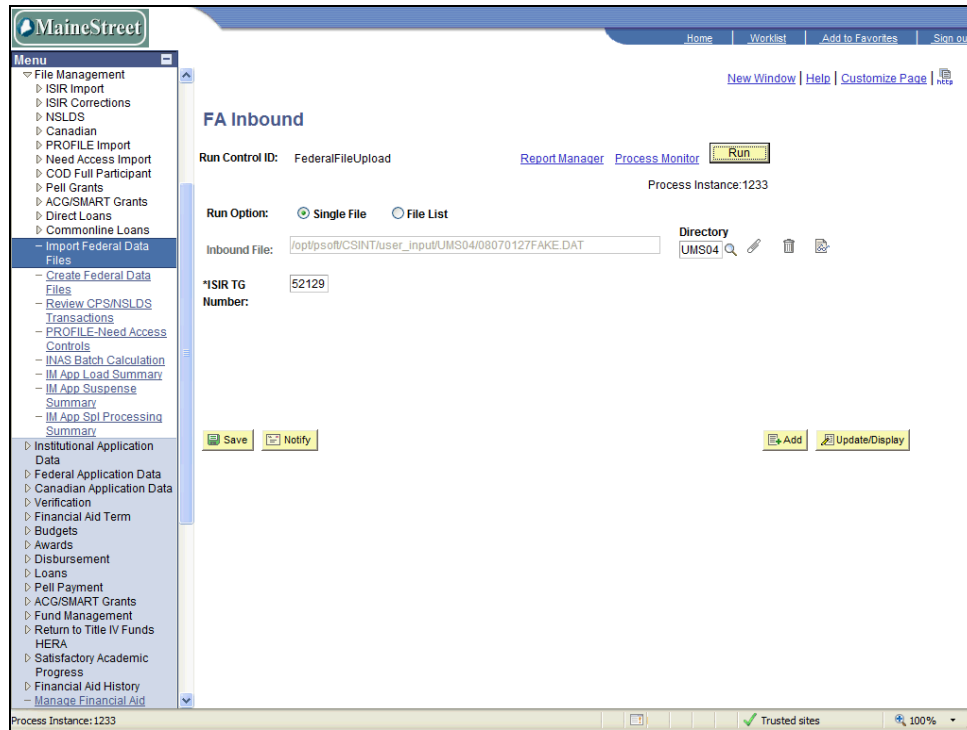
Recurrence:       Run Time: 3:03:28PM

Time Zone:

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

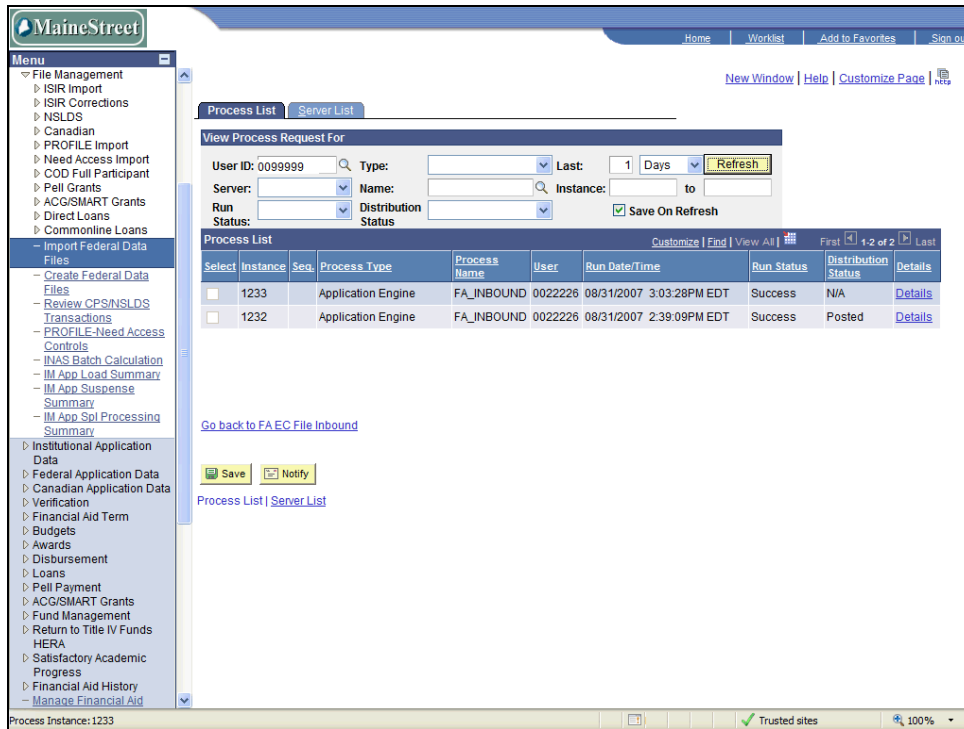
Step	Action
17.	Click <b>OK</b> . <input type="button" value="OK"/>



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

# Process Document

## Financial Aid: Importing A Federal Data File-032608





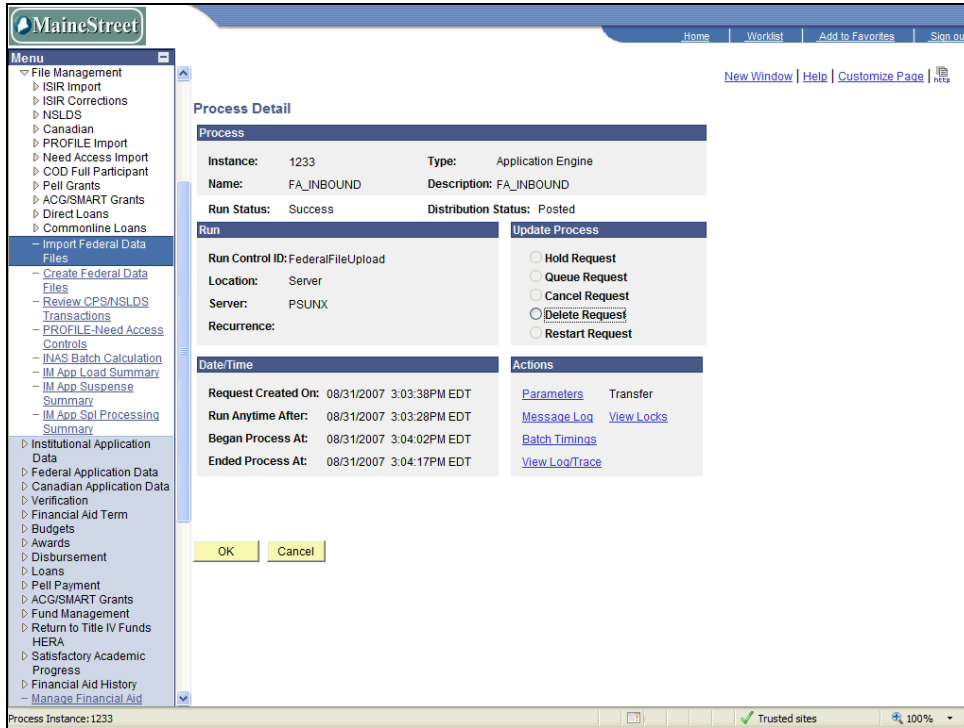
The screenshot shows the 'View Process Request For' form with the following fields:

- User ID: 0099999
- Type: [Dropdown]
- Last: 1 Days
- Refresh button
- Server: [Dropdown]
- Name: [Text]
- Instance: [Text] to [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"/>	1233		Application Engine	FA_INBOUND	0022226	08/31/2007 3:03:28PM EDT	Success	N/A	<a href="#">Details</a>
<input type="checkbox"/>	1232		Application Engine	FA_INBOUND	0022226	08/31/2007 2:39:09PM EDT	Success	Posted	<a href="#">Details</a>

Step	Action
19.	<p>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>.</p> <p>Note that the process is the first one in the Process List.</p> 
20.	<p>Once the process output has been posted, you can look at it to see if all went well.</p> <p>Click <b>Details</b>.</p> 

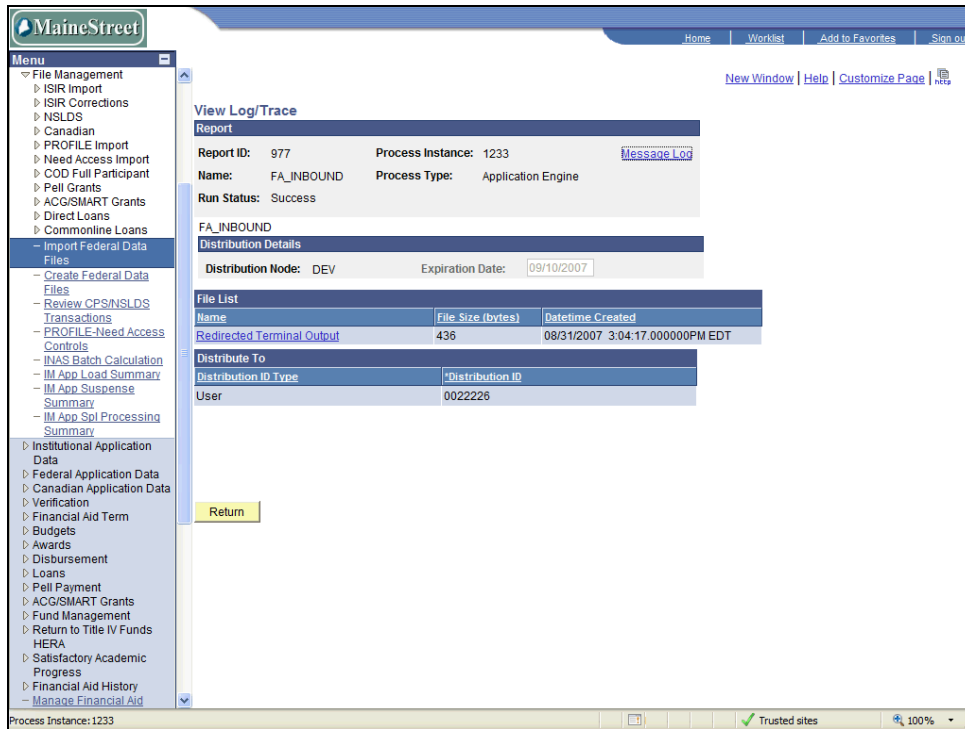


The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'File Management', 'Import Federal Data Files', and 'Institutional Application Data'. The main content area is titled 'Process Detail' and shows information for instance 1233. The process name is 'FA\_INBOUND' and its status is 'Success'. There are sections for 'Run' (with details like Run Control ID, Location, Server, and Recurrence) and 'Date/Time' (with details like Request Created On, Run Anytime After, Began Process At, and Ended Process At). An 'Actions' section contains links for 'Parameters', 'Transfer', 'Message Log', 'View Locks', 'Batch Timings', and 'View Log/Trace'. At the bottom of the main content area are 'OK' and 'Cancel' buttons. The status bar at the very bottom shows 'Process Instance: 1233' and a 'Trusted sites' indicator.

Step	Action
21.	Click the <b>View Log/Trace</b> link. <a href="#">View Log/Trace</a>

# Process Document

## Financial Aid: Importing A Federal Data File-032608




Step	Action
22.	Click <b>Redirected Terminal Output</b> . This will show you any error messages or other messages about your upload. <a href="#">Redirected Terminal Output</a>
23.	A new window opens showing you the output. Close the window when you have reviewed the messages.
24.	You may now view the ISIRs you have imported to the staging table. Use the Suspense Management component for this purpose.  In order to use suspense management conveniently, you need the "EC Queue Instance" number of the batch of ISIRs you uploaded. There is a tool you can use to obtain this number.
25.	Navigate: <b>University of Maine Systems &gt; Financial Aid &gt; Review CPS/NSLDS Transaction</b>



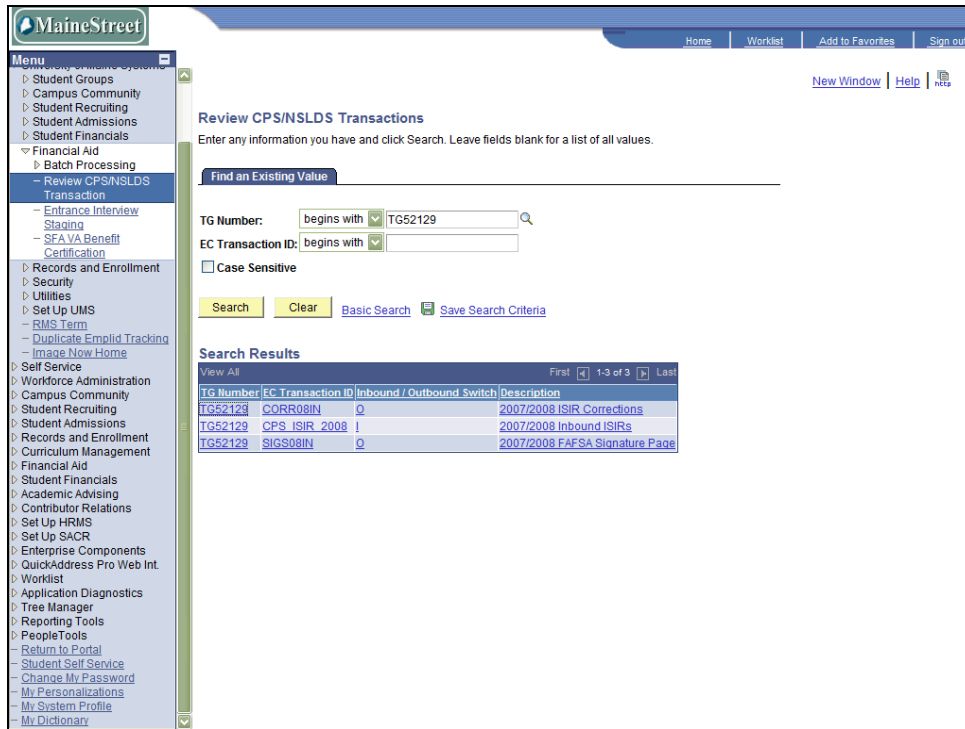
The screenshot shows the 'MaineStreet' web application. The left-hand navigation menu is expanded to show 'Review CPS/NSLDS Transactions'. The main content area is titled 'Review CPS/NSLDS Transactions' and contains the following elements:

- Home | Worklist | Add to Favorites | Sign out
- New Window | Help | [Printer Icon]
- Find an Existing Value
- Enter any information you have and click Search. Leave fields blank for a list of all values.
- TG Number: begins with [dropdown] [input field] [Search icon]
- EC Transaction ID: begins with [dropdown] [input field]
- Case Sensitive
- Search | Clear | Basic Search | Save Search Criteria

Step	Action
26.	Fill in the <b>TG Number</b> for your Institution. If you don't know it, click the look up button. 
27.	Select your Institution in the list. <input type="text" value="TG52129 UMM"/>
28.	Click <b>Search</b> . <input type="button" value="Search"/>


# Process Document

## Financial Aid: Importing A Federal Data File-032608



**MaineStreet**

Home | Worklist | Add to Favorites | Sign out

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

**Review CPS/NSLDS Transactions**

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

**Find an Existing Value**

TG Number:

EC Transaction ID:

Case Sensitive

[Basic Search](#)

**Search Results**

View All First  1-3 of 3  Last

TG Number	EC Transaction ID	Inbound / Outbound Switch	Description
TG52129	CORR08IN	Q	2007/2008 ISIR Corrections
TG52129	CPS ISIR_2008	I	2007/2008 Inbound ISIRs
TG52129	SIGS08IN	Q	2007/2008 FAFSA Signature Page

Step	Action
29.	Select the <b>Inbound</b> choice in the list.



The screenshot shows the 'ISIR File Review' page in the MaineStreet application. It features a table titled 'ISIR EC Queue Records' with 11 rows of data. Each row includes an 'EC Transaction ID', 'EC Queue Instance', 'EC Queue Status', an 'Update Status' button, 'EC Queue Control Number', 'TG Number', and 'EC Driver Datetime'. The status for all records is 'Loaded'. Below the table are buttons for 'Save', 'Return to Search', and 'Notify'.

EC Transaction ID	EC Queue Instance	EC Queue Status		EC Queue Control Number	TG Number	EC Driver Datetime
1 CPS_ISIR_2008	8	Loaded	Update Status	PS2007-10-11-06.31.44	52129	10/11/2007 9:31:45.000000AM
2 CPS_ISIR_2008	13	Loaded	Update Status	PS2007-10-25-08.55.11	52129	10/25/2007 11:55:14.000000AM
3 CPS_ISIR_2008	24	Loaded	Update Status	PS2007-11-07-11.19.55	52129	11/07/2007 2:19:58.000000PM
4 CPS_ISIR_2008	25	Loaded	Update Status	PS2007-11-07-11.27.15	52129	11/07/2007 2:27:17.000000PM
5 CPS_ISIR_2008	26	Loaded	Update Status	PS2007-11-07-11.30.33	52129	11/07/2007 2:30:33.000000PM
6 CPS_ISIR_2008	27	Loaded	Update Status	PS2007-11-07-11.32.35	52129	11/07/2007 2:32:35.000000PM
7 CPS_ISIR_2008	29	Loaded	Update Status	PS2007-11-07-12.28.21	52129	11/07/2007 3:28:22.000000PM
8 CPS_ISIR_2008	30	Loaded	Update Status	PS2007-11-07-12.31.54	52129	11/07/2007 3:31:54.000000PM
9 CPS_ISIR_2008	31	Loaded	Update Status	PS2007-11-07-12.32.55	52129	11/07/2007 3:32:55.000000PM
10 CPS_ISIR_2008	32	Loaded	Update Status	PS2007-11-07-12.33.57	52129	11/07/2007 3:33:57.000000PM
11 CPS_ISIR_2008	44	Loaded	Update Status	PS2007-11-28-08.52.47	52129	11/28/2007 11:52:51.000000AM

Step	Action
30.	The display shows all the sets of ISIRs that have been uploaded. Each set has a unique <b>EC Queue Instance</b> number which is used to refer to that set of ISIRs in the suspense table. You can use the date and time in the last column to identify the desired EC Queue Instance number.

# Process Document

## Financial Aid: Importing A Federal Data File-032608



**ISIR File Review**

ISIR EC Queue Records

EC Transaction ID	EC Queue Instance	EC Queue Status	EC Queue Control Number	IG Number	EC Drive
1 CPS_ISIR_2008	8	Loaded	PS2007-10-11-06.31.44	52129	10/11/2
2 CPS_ISIR_2008	13	Loaded	PS2007-10-25-08.55.11	52129	10/25/2
3 CPS_ISIR_2008	24	Loaded	PS2007-11-07-11.19.55	52129	11/07/2
4 CPS_ISIR_2008	25	Loaded	PS2007-11-07-11.27.15	52129	11/07/2
5 CPS_ISIR_2008	26	Loaded	PS2007-11-07-11.30.33	52129	11/07/2
6 CPS_ISIR_2008	27	Loaded	PS2007-11-07-11.32.35	52129	11/07/2
7 CPS_ISIR_2008	29	Loaded	PS2007-11-07-12.28.21	52129	11/07/2
8 CPS_ISIR_2008	30	Loaded	PS2007-11-07-12.31.54	52129	11/07/2
9 CPS_ISIR_2008	31	Loaded	PS2007-11-07-12.32.55	52129	11/07/2
10 CPS_ISIR_2008	32	Loaded	PS2007-11-07-12.33.57	52129	11/07/2
11 CPS_ISIR_2008	44	Loaded	PS2007-11-28-08.52.47	52129	11/28/2

Buttons: Save, Return to Search, Notify


Step	Action
31.	Armed with the EC Queue Instance number, you can look at the ISIRs you've just imported. Navigate: <b>Financial Aid &gt; File Management &gt; ISIR Import &gt; 20xx-20yy Suspense Management.</b>



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'ISIR Import', 'ISIR Corrections', and 'NSLDS'. The main content area is titled 'ISIR Susp Management 07/08' and contains a search form with the following fields:


- EC Queue Instance: [dropdown] [text input]
- Sequence Number: [dropdown] [text input]
- Load Status: [=] [dropdown]
- Social Security #: [dropdown] [text input]
- EmpID: [dropdown] [text input]
- Last Name: [dropdown] [text input]
- Aid Year: [dropdown] [text input] (value: 2008)
- TG Number: [dropdown] [text input]

At the bottom of the form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A 'Find an Existing Value' link is also present above the search fields.

Step	Action
32.	Enter the <b>EC Queue Instance</b> number.
33.	Enter or look up the <b>TG Number</b> for your Institution.
34.	Click <b>Search</b> . 

# Process Document

## Financial Aid: Importing A Federal Data File-032608



**ISIR Susp Management 07/08**

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

**Find an Existing Value**

EC Queue Instance: = [dropdown] [input: 44]

Sequence Number: = [dropdown] [input]

Load Status: = [dropdown]

Social Security #: begins with [input]

EmplID: begins with [input]

Last Name: begins with [input]

Aid Year: begins with [dropdown: 2008]

TG Number: begins with [dropdown: TG52129] [input]

[Search] [Clear] [Basic Search] [Save Search Criteria]

**Search Results**

View All [First] [1-9 of 9] [Last]

EC Transaction ID	EC Queue Instance	Sequence Number	Social Security #	EmplID	Load Status	Name Code	Date of Birth	Last Name	Student's First Name	Load Action	TG Number
CPS ISIR 2008	44	1	*****	(blank)	Unproc	FO	06/19/1988	FOOFRAM	HIRAM	(blank)	TG52129
CPS ISIR 2008	44	2	*****	(blank)	Unproc	LJ	11/24/1986	LINCOLN	ABE	(blank)	TG52129
CPS ISIR 2008	44	3	*****	(blank)	Unproc	QU	10/31/1987	QUEEN	ELIZABETH	(blank)	TG52129
CPS ISIR 2008	44	4	*****	(blank)	Unproc	CL	04/06/1987	CLAUS	SANTA	(blank)	TG52129

Step	Action
35.	The Search Results lists the ISIRs uploaded in this EC Queue Instance. Notice that the Load Status is "Unproc," which means that the data has been imported to the staging (suspense) table but no attempt has been made to load the ISIR data to the permanent tables.
36.	To view the information on a student's ISIR, click on a student in the list.
37.	For more on managing ISIRs, refer to the documentation on Loading ISIRs and Suspense Management.
38.	<b>End of Procedure.</b>