

9.2 Assigning a College Financing Plan in Batch

Purpose: Use this document as a reference on how to assign a College Financing Plan in batch in PeopleSoft

Audience: Financial Aid Staff responsible for distributing Consumer Information

! You must have at least one of these local college managed security roles:

- ZZ FA Pop Update

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Assigning a College Financing Plan in Batch Using Population Selection Update

Navigation: NavBar > Navigator > Set Up SACR > System Administration > Utilities > Population Update > Population Update Process

1. The Population Update Process run control search page displays.
2. Enter the desired **Run Control ID**. Use the **Add a New Value** tab if this will be the first time you are running this process.
3. Select the **Search** or **Add** button.

Population Update Process

Find an Existing Value Add a New Value

Run Control ID BATCH_ASSIGN_COLLEGE_FIN_PLAN

Add

4. The Population Selection Update page displays.
5. Select the **STDNT_AID_ATRBT** drop-down list option from the ***Record (Table) Name** row.
6. Enter a value in the **Institution** field.
7. Enter a value in the **Aid Year** field.
8. Ensure the **Report Error Messages** radio button is selected.

Population Selection Update

Run Control ID BATCH_ASSIGN_COLLEGE_FIN_PLAN Report Manager Process Monitor Run

Select Record fields for update Find | View All First 1 of 1 Last

5 *Record (Table) Name STDNT_AID_ATRBT - Packaging Status Summary

6 Institution WA140 Clark College

7 Aid Year 2020 2019-2020 Financial Aid Year

Error Reporting Selection

8 Report Error Messages ☒ Do Not Report Messages ☐ Report All Messages ☐

9. In the **Selection Tool** drop-down list, select **PS Query**.
10. In the **Query Name** field, enter **CTC_FA_SB_SL_SHOPPING_SHEET**.
11. Select the **Edit Prompts** link.

Population Selection Update

Run Control ID BATCH_ASSIGN_COLLEGE_FIN_PLAN Report Manager Process Monitor Run

Select Record fields for update Find | View All First 1 of 1 Last

*Record (Table) Name STDNT_AID_ATRBT - Packaging Status Summary

Institution WA140 Clark College

Aid Year 2020 2019-2020 Financial Aid Year

Error Reporting Selection

Report Error Messages ☒ Do Not Report Messages ☐ Report All Messages ☐

Population Selection

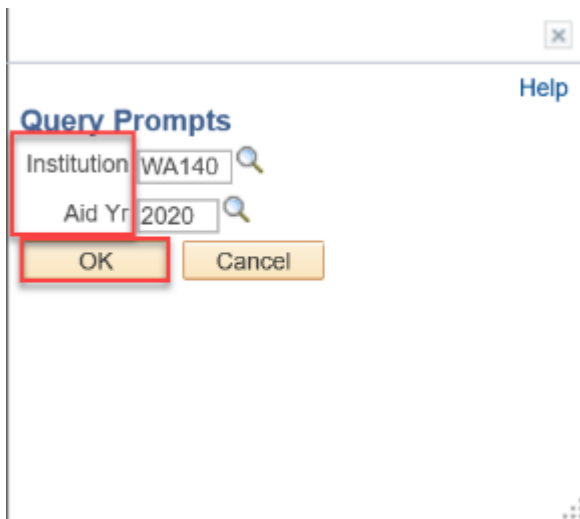
9 Selection Tool PS Query

10 Query Name CTC_FA_SB_SL_SHOPPING_SHEET

11 Edit Prompts

Launch Query Manager Preview Selection Results

12. The Query Prompts page displays.
13. Enter the **Institution**.
14. Enter the **Aid Year**.
15. Select the **OK** button.



Query Prompts

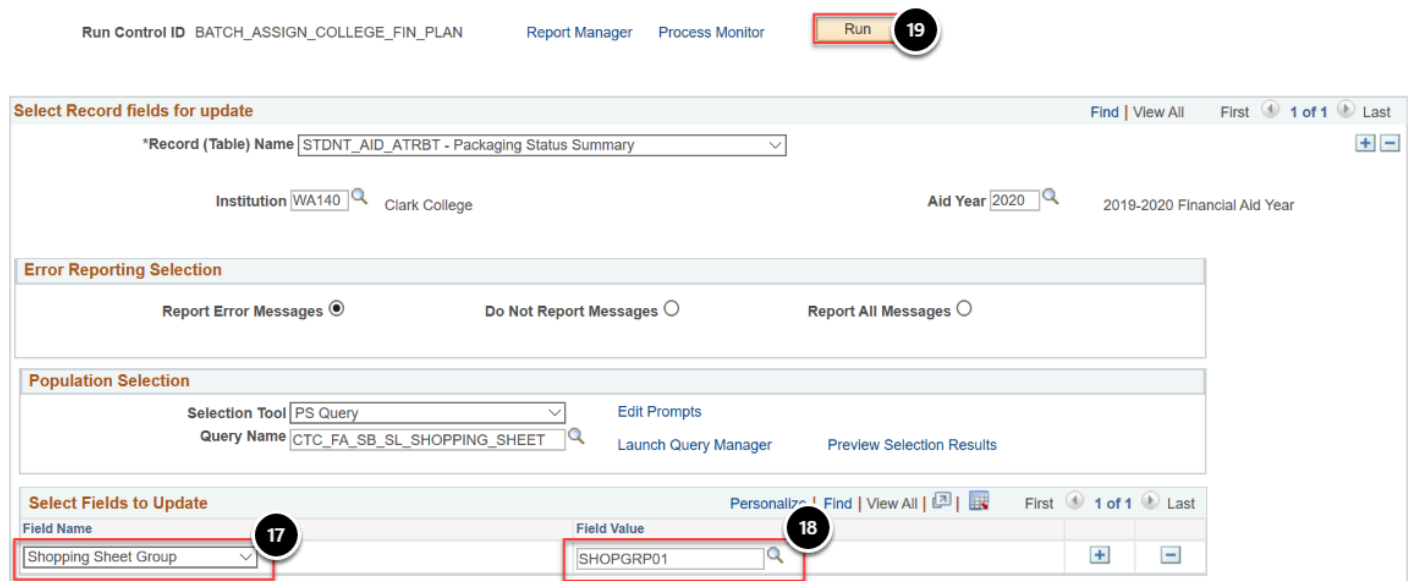
Institution WA140

Aid Yr 2020

OK Cancel

16. The Population Selection Update page displays.
17. In the **Select Fields** to update row, in the **Field Name** column, select **Shopping Sheet Group** from the drop-down list option.
18. In the Field Value column, select the corresponding group of **SHOPGRP01**.
19. Select the **Run** button.

Population Selection Update



Run Control ID BATCH_ASSIGN_COLLEGE_FIN_PLAN Report Manager Process Monitor Run 19

Select Record fields for update Find | View All First 1 of 1 Last

*Record (Table) Name STDNT_AID_ATTRBT - Packaging Status Summary

Institution WA140 Clark College Aid Year 2020 2019-2020 Financial Aid Year

Error Reporting Selection

Report Error Messages ☒ Do Not Report Messages ☐ Report All Messages ☐

Population Selection

Selection Tool PS Query Edit Prompts

Query Name CTC_FA_SB_SL_SHOPPING_SHEET Launch Query Manager Preview Selection Results

Select Fields to Update Personalize Find | View All First 1 of 1 Last

Field Name	Field Value
Shopping Sheet Group	SHOPGRP01

20. The Process Scheduler Request page displays.
21. Select the **SCC_POP_UPD** checkbox.
22. Select the **OK** button.

Process Scheduler Request

User ID CTC_KFORSBERG Run Control ID BATCH_ASSIGN_COLLEGE_FIN_PLAN

Server Name Run Date 09/11/2019

Recurrence Run Time 1:53:32PM

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Publish Pop Update	EIPPOPOP	PSJob	(None) ▾	(None) ▾	Distribution
<input checked="" type="checkbox"/>	SCC_POP_UPD	SCC_POP_UPD	Application Engine	Web ▾	TXT ▾	Distribution

23. The Population Selection Update page displays.
24. Note your **Process Instance** number, and use it track your job's status at the **Process List** page.
25. Select the **Process Monitor** hyperlink.

Population Selection Update

Run Control ID BATCH_ASSIGN_COLLEGE_FIN_PLAN Report Manager **Process Monitor**
Process Instance:30523776

Select Record fields for update Find | View All First 1 of 1 Last

*Record (Table) Name STDNT_AID_ATRBT - Packaging Status Summary

Institution WA140 Clark College Aid Year 2020 2019-2020 Financial Aid Year

Error Reporting Selection

Report Error Messages ☒ Do Not Report Messages ☐ Report All Messages ☐

Population Selection

Selection Tool PS Query Edit Prompts

Query Name CTC_FA_SB_SL_SHOPPING_SHEET Launch Query Manager Preview Selection Results

Select Fields to Update Personalize | Find | View All | First 1 of 1 Last

Field Name	Field Value
Shopping Sheet Group ▾	SHOPGRP01

26. The Process Monitor page displays.
27. On the Process List tab, ensure your process runs to a **Run Status** of **Success**, and a **Distribution Status** of **Posted**.

View Process Request For

User ID

_KFORSBERG

Type

Last

1

Days

Refresh

Server

Name

Instance From

Instance To

Run Status

Distribution Status

Save On Refresh

Process List

1-1 of 1

View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	30523776		Application Engine	SCC_POP_UPD	CTC_KFORSBERG	09/11/2019 1:53:32PM PDT	Success	Posted	Details

[Go back to Population Update Process](#)

Save

Notify

28. End of procedure.