# Import and Process a Single ISIR File

**Purpose:** Use this document as a reference on how to process financial aid applications by importing and processing ISIR files using ctcLink.

**Audience:** Financial Aid staff.

Colleges have the option to load ISIRs individually or combined in a batch process. We take you through an easy 3-step process that begins with uploading your file and ending with loading the ISIR.

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

- ZD FA Director
- ZD FA FISAP Prcs
- ZZ FA Aid Year Activation
- ZZ FA Award Processor
- ZZ FA CT Reports
- ZZ FA College Bound Schlrship
- ZZ FA Direct Loan Processor
- ZZ FA Funds Manager
- ZZ FA ISIR Corrections
- ZZ FA ISIR Processor
- ZZ FA NSLDS Prcs
- ZZ FA Pell Processor
- ZZ FA SAP Prcs
- ZZ FA Verification Prcs
- ZZ FA WCG Eligibility
- ZZ SF Collections
- ZZ Upload Doc ADM
- ZZ Upload Doc ADV
- ZZ Upload Doc SR

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

# Import and Process an ISIR File

## Step 1 - File Upload

> ⚠ All ISIR files need to be processed through the upload process regardless if using the individual process or combined process.

**Navigation:  People Tools > CTC Custom > Extensions > Upload/Download Files**

1. You are now on the Upload/Download files search page.
2. Enter **Academic Institution** - *in this example TCC is used.*
3. Enter **Functional Area - Financial Aid.**
4. Enter **Business Process Name** - *in this example ISIR 2024 is used.*
5. Select the **Search** Button.
6. The **Upload/Download** files page displays.
7. Select **Upload File** and choose appropriate file to upload.

> 💡 ISIR Files need to be uploaded one at a time as well as the text file (.txt) created if using the combined process.

8. Select the **Upload File** button.
9. Select **Browse** to locate the file you wish to upload - then select the **Upload** button.
10. The file will be uploaded and the **File Name** will appear.
11. A message window confirms the upload is successful; select the **OK** button.

## Video Tutorial

> The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

**View Tutorial Via Panopto**

View the external link to [Import and Process a Single ISIR File](#). This link will open in a new tab/window.

# Step 2 - Import Federal Data Files

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

- ZD FA ISIR File Prcs
- ZZ FA ISIR File Prcs
- ZZ FA ISIR Processor

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

**Navigation:  Financial Aid > File Management > Import Federal Data Files**

ℹ The FA Inbound process automatically determines the type of file from CPS and loads the file into the inbound staging tables.

1. The FA EC File Inbound search page displays.
2. Enter **Run Control ID** or create a new one by selecting the **Add a New Value** tab.
3. Select the **Add** or **Search** button.
4. The FA Inbound page displays.
5. Select **Run Option: Single File** or **File List** radio button.
   - **Single File** when loading single files;
   - **File List** when loading combined files.
6. Enter the **Inbound File** name using the File Path and File Name used in Upload/Download process above.

💡 *Tip!* Copy and paste the file path and file name from the upload tab in an effort to reduce keystroke errors

7. Enter the Institution's **TG Number**.
8. Select the **Run** button.
9. The **Process Scheduler** pagelet appears-select OK.
10. A **Process Instance** number should be assigned, you can use this number to track the status in Process Monitor.
11. Select the **Process Monitor** link.
12. Locate the Process Instance number assigned in prior step and select the **Refresh** button until **Run Status** is "**Success**" and **Distribution Status** is "**Posted**".
13. Select the Actions link, then select the Message Log drop-down option.
14. Check to see the file was processed successfully.

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# Step 3 - Process a Single File ISIR

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

- ZD FA ISIR Imports
- ZZ FA ISIR Imports
- ZZ FA ISIR Processor

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

**Navigation:  Financial Aid > File Management > ISIR Import > Process ISIRs**

This step load the ISIR records from the ISIR staging tables into the database using the rules that were set up in the ISIR Data Load Parms page.

1. The **Process ISIR Load** search page displays.
2. Enter the **Run Control ID**.
3. Select the **Add** or **Search** button.
4. The Process ISIRs page displays.
5. Enter **Institution** (must be done first before Aid Year - enter values in from left to right).
6. Enter **Aid Year** - *in this example, 2024 is used.*
7. Enter **TG Number**.
8. Ensure the **Active** checkbox is selected.
9. Select the **Load ISIRs** checkbox.
10. Select the **Load System Generated ISIRs** checkbox.
11. Select **Load ISIR Corrections** checkbox.
12. Select the **Run** button.
13. The **Process Scheduler Request** pagelet appears-Select the **OK** button.
14. Locate the **Process Instance** number and note it to track it in Process Monitor.
15. Select the **Process Monitor** link.
16. The **Process List** tab displays.
17. Select the **Refresh** button until **Run Status** is "**Success**" and **Distribution Status** is "**Posted**".
18. You have successfully imported and processed ISIR files.
19. End of procedure.

## Video Tutorial

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## View Tutorial Via Panopto

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