Leveraging Automic/UC4 Automation at San Jacinto College

Presented by:

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An Equal Opportunity Institution



Background

San Jacinto College is transforming the way we do business by leveraging Automic/UC4 and Banner applications to automate current manual processes.

San Jacinto has been using Automic UC4 for the past 10 years.

Discuss some of the key processing abilities in Automic Application Manager.

Demonstrate a few processes automated through Automic at San Jacinto College.



Key Points

- Demonstrate the layout of the Automic User Interface.
- Demonstrate how baseline jobs are processed through Automic.
- Demonstrate how custom processes are executed through Automic.
- Demonstrate how custom scripts can be integrated into Automic.
- Demonstrate some of the processes San Jacinto automated in Automic.

Automic User Interface

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Automic User Interface – Menu/Toolbar

Eile Activities Object Admin Options View Tools Help

• Menu drop down options.

- Administration options
- Forecasting options
- Other options
- Toolbar Shortcut to commonly used options
 - Jobs & Process
 - Users
 - Substitution Variables

Automic User Interface – Explorer Window

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Explorer Window

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- Used to view items in:
 - Backlog
 - Ad Hoc
 - Agent Groups
 - Queues
 - Etc.
- Select option to filter items in the Backlog or History window.
- Selection of various reports available.
- Look up general help.

Automic User Interface – Backlog View

Search

	@ Backlog 4												
Queue	Run ID C	D Task Name	Start Date	Started	Elapsed	Status	Agent	Requestor	Parent	BAN-ONEUP	BANUID	Captured?	Return Code
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Backlog Window

- Displays the jobs currently running.
- Displays all jobs set to be executed.
- Displays the current status of the jobs.
 - ABORTED
 - BAN-SECURITY
 - HOLD
 - INITIATED

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Automic User Interface – History View

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BANNER	1175549	REMOVE_HEADER	05-17-22 11:38	00:00:00	FINISHED	AMPROD	MDEAVER	FA_DATALOAD_IDSA_2122						
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- Before a Banner process can be executed in Automic, the Banner job must be added in Automic.
- Banner Jobs are added to Automic through the Agent Administration in the Banner Tab under the Create Job tab.
- Once the desire job is created, click Cancel to exit out of the Agent Administration window.
- Note: The job object will need to be added to the Banner Security class of the UC4 user or the process will abort with a BAN-SECURITY error message.

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- Banner jobs will function in a similar manner as they would in Banner Job Submission.
- Jobs can use the exact same parameters they would be used in Banner.
- All job output is viewable in Automic.
- Job output can be emailed to a user.
 - Output can be sent in original format.
 - Output can be sent formatted in PDF.
 - Output can be sent in zip files.

GLRLETR Example Job

🤹 Task Details: G	LRLETR-FA_APP_RECD_ACK-2122 1175663			
General Bann	er Predecessors Successors Flow Diagra	am Condit	Documentation Output Files Comments Comments Query	
Program Informa	tion		Banner Output	
Program	alrietr *	Search	Printer c2-254pr01 Search	
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Parameters				
Prompt Type	Description	Required	Value Parameter Set	
01 Single	Application Code	Y	NAID Edit User Name	Commit
02 Single	Word Processor Extract Option	Y	User Name	search
03 Single	Print ALL Pending Letters		Add Single Parameter Set	Search
04 Single	Letter Code		A_APP_RECD_ACK Add Multi	Allow Change at Request Time
05 Single	Sort Variable			Allow Citalige at Request Time
06 Single	Term Code	Y	2 Add Dynamic	Preserve Existing Parameter Values
07 Single	Audit Indicator	T		
09 Single	Free Format Date 1		Usere de la compart Value	s Now
10 Single	Free Format Date 2		sysdate} Move Up	
11 Single	Free Format Date 3		sysdate}	
12 Single	Aid Year Code		1 Move Down	
4			•	

GLRLETR Example Job

• Parameters can be made up of:

- Hard coded values
- Substitution variables
- Prompt variables
- Imported values from a saved data set
- Dynamic Parameters
- Banner output can be set up to be sent to a printer.
- FormFusion Print Parameters can be used for the call to Evisions.





GLRLETR Example Job

- Conditions can be added that will send job status notifications.
- Job output can be included in notification.
- Conditions can also be added to control a variety of tasks.
 - Check for file status.
 - Check for population counts.
 - Set substitution variables.
 - Run Host commands.



GLRLETR Example Job

🚳 Task Details: GLRLETR-FA_APF	P_RECD_ACK-2122 1175663						r ک 🗹
General Banner Predecess	ors Successors Flow Diagram	Conditions Documentation Output File	s Comments Comments Query				
Order	Timing	Performed	Condition#1	Qual	Condition#2	Action	Action Argument
1	BEFORE	ONCE	#FA_GLBDATA_{top_flow_id}	=	0 SE	END NOTIFICATION F	A_TRACKING_LETTERS A
2	BEFORE	ONCE	#FA_GLBDATA_{top_flow_id}	=	0 SE	ET SKIP STATUS S	:KIP=0
3	AFTER	ONCE	STATUS	=	FINISHED SE	END NOTIFICATION F	A_TRACKING_LETTERS C
		Condition Details - 1175663 Timing Cogdition AFTER STATUS Test ff status FINISHED Action Command Then SEND NOTIFICATION Action Timing	FA_TRACKING_LETTERS C	2 Details			
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- Examples of ideal processes in Automic:
 - Letter Generation
 - Term Grade Roll
 - Financial Aid Dataload
 - Financial Aid Processing
 - Automated Hold Processing



- Almost any Banner job can be automated in Automic.
- A rule of thumb would be to automate jobs that do not require frequent changes.
- Automating jobs that have static variables or static values are a great candidate for automation.
- For parameters or values that change, variables can be created and populated to handle some type of values.
 - Substitution variables can store the values.
 - Prompt Variables can store values for the specific job.
 - Conditions can be set up perform basic changes.



Custom job processing in Automic.

- Custom jobs can be executed in Automic.
- Custom job should be coded in a similar fashion as a regular Banner job.
- Custom job would need to be submittable through Banner Job Submission.
- Output can be included in notifications as well.
 - Other functions may need to be programmed if the output is stored is not stored in the banjob directory.



Custom job processing in Automic.

- Custom processes at San Jacinto typically start with 'Z'.
- Output from job goes to a specific directory outside of normal banjob directory.
- An additional job is used to copy output file to the banjob directory.
- The copy file process uses an internal mail-x command to email the output files to users.

ZFRZERO Custom job process

					ZFRZERO			
General Outpu	t Banner	Predecessors	Conditions	Documentation				
Program Informat	ion				Banner Output			
Program	zfrzero		*	Search	Printer	DATABASE	S	earch
Command Name					Deinter		Delete	
Program Type	Procedur	e	*		Printer Form	Add	Delete	
Type Code	P *				Lines Per Inch			
Login Override			-		Advanced Out	put		
					Output Search	Pattern .*[^0-9]{ONE_UF	?}[^0-9].*	
Source File Overn	ido			Count	Rename Outpu	It Pattern		
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Parameters	,							
Prompt Type	-	Description	1	Required		Value	Edit	Parameter Set
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							Add Single	Parameter Set
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							Move Up	<= Import Values Now
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							WOVE DOWN	
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ZFRZERO Example Job

- Conditions can be added that will send job status notifications.
- Conditions can also be added to control a variety of tasks.
 - Check for file status.
 - Check for population counts.
 - Set substitution variables.
 - Run Host commands.





ZFRZERO - Conditions

							ZERZERO			
General	Output	Banner	Predecessors	Conditions	Documentation	n	LINELIO			
Or	der		Timing	Per	formed	Condition#1	Qual	Condition#2	Action	Action Argument
	1	AFTER		ONCE		{status}	=	FINISHED	SEND NOTIFICATION	AR_ZFRZERO_NOTIFY F
	2	AFTER		ONCE		{status}	!=	FINISHED	SEND NOTIFICATION	AR_ZFRZERO_NOTIFY A
	3	AFTER		ONCE		STATUS	=	FINISHED	SET SUBVAR	#zfrzero_oneup_number={

1



ZFRZERO Copy File process

Genera	al Output	Prompts Predecessors	Conditions	Documentation	COPY_FILE-ZFRZERO			
#		Description			Default	Value	Re	Select
1 F	ile Source & Fil	e Name				{#CUST_PROC_DIR}zfrzero_{#zfrzero_oneup_number}.lis	Y	

X



ZFRZERO Copy File Process

• Copy File process generates a shell script to copy the output from custom process directory to the Banner banjob directory.

• Conditions are added to sent the notification of job status with the output.

• Automic is set up to only read the normal banjob directory.

ZFRZERO – Copy File Conditions

				COPY	_FILE-ZFRZERO			
General	Output	Prompts Predecessor	s Conditions Documenta	ation				
C	rder	Timing	Performed	Condition#1	Qual	Condition#2	Action	Action Argument
	1	AFTER	ONCE	STATUS	=	FINISHED	RUN HOST COMMAND	echo "The output for the UC
		-						
		Condition Details - AR	_SEQUENCE_OF_REFUNDS(CO	PY_FILE-ZFRZERO)				
		Timing Condition						
		AFTER 🔽 STATUS	•					
		Test						
		If status = 🔻 FINI	SHED 💌					
		Action						
		Co <u>m</u> mand						
		Then RUN HOST COMM	AND 🗨 echo "The c	utput for the UC4 automated	{}			
		Action Timing						
		The first time	the condition is true					
		Every time the	condition is true					
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Custom script processing in Automic.

- Custom scripts can be processed in Automic.
- Custom scripts can include:
 - Remove header records
 - Dos to Unix file format
 - File transfer processes
 - Insert header records
 - Parsing out a file into multiple files





Custom script processing in Automic.

- Various types of scripts can be used.
 - Perl scripts
 - Shell scripts
 - etc
- Scripts are stored in the Automic exec directory.
- An Automic Job is created to process the script.
- The executable script is then assigned to the Automic job.



Usage of Jobs in Automic/UC4

- Baseline/Custom Banner Jobs will exist as a stand-alone global job instance.
- The global job can be executed in a single run fashion using specified parameters.
- Be careful when using a global job as any modification to the global job instance could impact another process referencing the global job.
- It is advisable to add the global job to a Process.
- Once the job is in a Process, parameters, condition, etc can be added to job without affecting the global job.
- The parameters, conditions, etc assigned in a Process will only exist in the Process and not affect the global job.

Global Job Instance

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Jobs Selector					X		
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Applications		Name	Descri	ption			
(All)		GLRLETR	Letter Generation Print F	Report	New		
APPLICATIONS_N	MANAGER					Parent BAN	N-ONEUP BANUID Captured? Return Code
AW_REPORTS					<u> </u>		
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		Jobs: GLRI FTR					ra 1
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		General Banner Execution C	options Output Schedule	Predecesso	ors Conditions Documentation	on User Groups	
		Program Information			Banner Output		
		Program girletr		Search	Printer NORRINT		Search
BAN	NNER 125	Command Nama					36arch
BAN	NNER 129	Command Name			Printer Form	Add Delete	
BAN	NNER 129	Program Type Procedure	*			Add Delete	
BAN	NNER 129	Type Code			Lines Per Inch		
BAN	NNER 12:	Type code					
BAN	NNER 129	Login Override	-		Advanced Output		
BAN	NNER 129				Output Search Pattern .*[^0-9	71(ONE UP)[^0-9].*	
BAN	NNER 129				Beneme Output Dettern		
BAN	NNER 129	Source File Override		Search	Rename Output Pattern		
BAN	NNER 129	2				Reset Default	s
BAN	NNER 129	2					
BAN	NNER 129	Parameters					
BAN	NNER 129	Desmat Tune	Description	Demuired	Value		Darameter Set
BAN	NNER 125	Of Cingle Application Code	Description	rtequirea	value	Edit	
BAN	NNER 123	02 Single Word Processor	Fytract Option	v	0		User Name Search
BAN	NNER 129	0.3 Single Print ALL Pendir	a Letters		*	Add Single	Parameter Set Search
BAN	NNER 129	04 Single Letter Code					Search
BAN	NNER 129	05 Single Sort Variable				Add Multi	✓ Allow Change at Request Time
BAN	NNER 129	06 Single Term Code		Y	Y2K001	Add Dynamic	Processo Existing Parameter Values
BAN	NNER 129	07 Single Module Code		Y		ride by admite	
BAN	NNER 129	08 Single Audit Indicator				Delete	
BAN	NNER 129	09 Single Free Format Dat	e 1		(SYSDATE)		<= Import Values Now
BAN	NNER 129	10 Single Free Format Dat	02		(SYSDATE)	Move Up	
BAN	NNER 129	11 Single Free Format Dat	03		(STSDATE) 0405	Move Down	
BAN	NNER 128	12 Single Ald Year Code			8480	move bown	
BAN	NNER 129					- F	
BAN	NNER 129						
BAN	NNER 129	5					
BAN	NNER 129						V OK V Apply Request Cancel P Help
E DAN	NINICO 400						

Process Instance

- A Process is like a string or chain and are made up of multiple jobs, scripts, or other processing functions.
- Multiple similar jobs can exist in one Process using different parameter sets.
 - Once a job is added to the Process, the parameters, condition, etc. are added to the job in the process.
 - These parameters, conditions, etc will only affect that specific job in the Process.
- Parameters saved for the job in a Process will not affect the global job instance.
- Processes offer a way to run multiple items to all a wide array of automation.



San Jacinto Automic Process Examples

• Part of Term Grade Roll

• Refunding processing for Finance Department

• Financial Aid Dataload processing



Part of Term Grade Roll

Process Flows: ST_PART_TERM_GRADEROLL	r g 🛛
General Components Output Schedule Prompts Conditions Documentation User Groups	
Elle Edit View Options Predecessors Simulation	General Output Prompts Predecessors Conditions Documentation
Image:	Job Component Active Description Job Active
Scale: E B Control Con	Job Component Active DescriptionJob Active _ Alas Eligibility Calendar I D Bun Skip Mo Tu u We Th _ Fr Sa Su Execution Agent Login Cutput Scan No Selection Roiffication No Selection Environment Variable No Selection Use Reguest Output Device Uge Job Conditions
SHROOPA COLLECT PT ORADE ROLL ZSPPSPLATI_ORADE_ROLL SZPTSPLAT_ORADE_ROLL	
ZFRROAM FT ORADE ROLL 3 REMOVE SUBVAR VALUES 3 4	
	✓ OK ✓ Apply ► Request X Cancel ? Help

Part of Term Grade Roll





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Part of Term Grade Roll Process

- Uses a variety of different jobs and functions.
- Baseline Banner Jobs are used.
- Custom Banner Jobs are used.
- Conditions are used for Term Establishment.
- Copy file shell script is used to move files.
- Host commands are also used to call the mail-x process to send notifications.



Part of Term Grade Roll

• Prompt Variables are used to identify the Part of Term Dates

neral Components Output Schedu	le Prompts	Conditions	Documentation	User Groups			
#		Des	cription				
1 PART TERM 4A FAL DATE							20210920
2 PART TERM 5A FAL DATE							20210927
3 PART TERM 6A FAL DATE							20211004
4 PART_TERM_4B6AS_FAL_DATE							20211018
5 PART_TERM_5B_FAL_DATE							20211101
6 PART_TERM_12A4C_FAL_DATE							20211115
7 PART_TERM_13B5C1W157B_FAL_DATE							20211206
8 PART_TERM_3_SPR_DATE							20220103
9 PART_TERM_4A_SPR_DATE							20220214
0 PART_TERM_5A_SPR_DATE							20220221
1 PART_TERM_6A6AS_SPR_DATE							20220301
2 PART_TERM_4B_SPR_DATE							20220321
3 PART_TERM_5B_SPR_DATE							20220404
4 PART_TERM_12A4C_SPR_DATE							20220418
5 PART_TERM_13B5C1W157B_SPR_DATE							20220509
6 PART_TERM_3_SUM_DATE							20220606
7 PART_TERM_5AM5AW5AT8_SUM_DATE							20220711
8 PART_TERM_8A11_SUM_DATE							20220801
19 PART_TERM_1WF1WS_SUM_DATE							20220808
ta type		Olistof	Values O Mult	Select O Com	ma Separated	🛃 Сору	



Description

Part of Term Grade Roll

Condition to set Term Code

General Output Prompts Predecessors Conditions Documentation Order Timing Cenditions Condition#1 Qual Condition#2 Action Action Argument 1 BEFORE CONTINUOUS (#YYYMMDD) >= 20210823 SET SUBVAR #POT_DEFINED_TERM. 2 BEFORE CONTINUOUS (#YYYMMDD) >= 2021213 SET SUBVAR #POT_DEFINED_TERM. 3 BEFORE CONTINUOUS (#YYYMMDD) >= 20220516 SET SUBVAR #POT_DEFINED_TERM. 6 Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Imming Common Common Emport	Gamma	Outrust /	Deserved	Destaura	O and the and	9 2	SET_TERM_SUBVAR			
Order Uming ContributoUS (#YYYYMIDD) >= 20210233 SET SUBVAR #POT_DEFINED_TERM 2 BEFORE CONTINUOUS (#YYYYMIDD) >= 20211213 SET SUBVAR #POT_DEFINED_TERM 3 BEFORE CONTINUOUS (#YYYYMIDD) >= 20220516 SET SUBVAR #POT_DEFINED_TERM 3 BEFORE Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Iming Condition ETSUBVAR #POT_DEFINED_TERM 4 Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Iming Condition ETSUBVAR #POT_DEFINED_TERM 4 Condition Etsubvar Very timetion Iming Condition Etsubvar #POT_DEFINED_TERM 4 Condition Iming Condition Iming Condition Iming Iming <th>General</th> <td>Output</td> <th>Prompts</th> <td>Predecessor</td> <td>s Conditions</td> <td>Documentation</td> <td></td> <td></td> <td></td> <td></td>	General	Output	Prompts	Predecessor	s Conditions	Documentation				
1 DEPORE CONTINUOUS (#TYYYMIDD) >= 20210823 SET SUBVAR #POT_DEFINED_TERM 3 BEFORE CONTINUOUS (#TYYYMIDD) >= 20220516 SET SUBVAR #POT_DEFINED_TERM Iming Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Iming Condition DefineD_TERM SET SUBVAR #POT_DEFINED_TERM Iming Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Iming Condition DefineD_TERM SET SUBVAR #POT_DEFINED_TERM Action Command Iming Command Iming Command Iming Command Iming	Order	4 55	TIM	ng	Performed	Condition#1	Quai	Condition#2	Action	Action Argument
2 DEFORE CONTINUOUS (#YYYYMMDD) >= 2022016 SET SUBVAR #FOT_DEFINED_TERM 3 BEFORE Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST_PART_TERM_SUBVAR) Image: Condition Details - ST		1 85	FORE	0	ONTINUOUS	{#YYYYMMDD}	>=	20210823	SET SUBVAR	#POT_DEFINED_TERM
Since Contributions = ST_PART_TERM_GRADEROLL(SET_TERM_SUBVAR) Iming Cogdition BEFORE USER DEFINED Test If (#YYYYMMDD) Action Command Then SET SUBVAR #POT_DEFINED_TERM=202230 (Action Timing OTher the condition is true Disabled		2 00	EORE				>=	20211213	SET SUBVAR	#POT_DEFINED_TERM
New Conv. Sup Sown	New		Fdit	Conditio	m Details - ST_PA Condition USER DEFINED MMDD) mand SUBVAR ion Timing The first time the cor Disabled Every time the cor	RT_TERM_GRADEROLL(SET_	▼ 20220516 ED_TERM=202230			



Part of Term Grade Roll

 Condition to set Part of Term Valu
--

1	SET_PART_OF_TERM_SUBVAR-SUM									
Gen	eral Output	Prompts	Predecessors	Conditions	Documentation					
	Order		Timing		Performed	Condition#1	Qual	Condition#2	Action	Action Argument
		1 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM1=3
		2 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM2=1
		3 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM3=1
100		4 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM4=1
		5 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM5=1
		6 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM6=1
200		7 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM7=1
		8 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM8=1
		9 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM9=1
		10 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM10=1
		11 BEFOR	E	CONTIN	UOUS	{#YYYYMMDD}	=	{#16}	SET SUBVAR	#PART_OF_TERM11=1

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Part of Term Grade Roll

- Banner baseline and custom jobs used include:
 - ZFRROLL
 - ZSPNGSR
 - SHRROLL
 - SHRRPTS
 - SHRCGPA
 - ZSPPSPU
 - SZPTSPU
 - ZFRRGAM





Refunding Process

- Conditions establish current and previous term code.
- Baseline processes are executed.
- Custom processes are used.
- Baseline Automic/UC4 scripts
- Custom Scripts

AR_SEQUENCE_OF_REFUNDS
ESTABLISH TERM CODE
1
ESTABLISH_PREV_TERM_CODE
ESTABLISH_CPD_TERM_CODE
ESTABLISH_PREV_CPD_TERM_CODE
ESTABLISH_AIDT_CODE
SFRFASC C
TSRTBIL-CURRENT_TERM
TSRTBIL-CPD_TERM
TSRTBIL-PREV_CPD_TERM C
1
TSRCBIL-CURRENT_TERM
TSRCBIL-PREV_TERM
TSRCBIL-CPD_TERM
<u>1</u>
TSRCBIL-PREV_CPD_TERM
RPEDISB-A-CURR_TERM
RPEDISB-A-PREVIOUS TERM
1
RPEDISB-PREVIOUS_FALL
ZFRZERO
COPY FILE-ZFRZERO
ZFPBNFD
COPY_FILE_ZFPBNFD
TGRAPPL
1
TGRCLOS
TGRFEED
ZTRHONE
2. THISNE
COPY_FILE-ZTRHONE C

100

Refunding Process for Finance Department

• Dates are evaluated to determine Term Code using conditions.

Order	Timing	Performed	Condition#1	Qual	Condition#2	Action	Action Argument
1	BEFORE	ONCE	{#YYYYMMDD}	<=	20210913	SET SUBVAR	#AR REFUND TE
2	BEFORE	ONCE	{#YYYYMMDD}	<=	20220615	SET SUBVAR	#AR REFUND TE.
3	BEFORE	ONCE	{#YYYYMMDD}	<=	20220127	SET SUBVAR	#AR REFUND TE
Condition Timing BEFORE Test If (#YYYY) Action Condition Co	Condition Condition USER DEFINED (MMDD) (MMD	UENCE_OF_REFUNDS(ES	JND_TERM_CODE=20:	2210 ✔ ОК ХС	 ☑ ☑ ☑ ☑ ⓐ 		



Refunding Process for Finance Department

- Process executed include custom and baseline using term code include:
 - SFRFASC
 - TSRTBIL
 - TSRCBIL
 - RPEDISB
 - ZFRZERO
 - TGRAPPL
 - TGRCLOS
 - TGRFEED
 - ZTRHONE

SFRFASC – Refunding Process

				SFRFASC	
General	Outpu	Banner Predecessors Conditions D	Oocumentatio	n	
Program	Informat	ion		Banner Output	
Program		sfrfasc *	Search	Printer NOPRINT	Se
Comman	d Name				
commun	iu nume			Printer Form Add Dele	te
Program	Туре	Pro*C *			
Type Cod	le	C *		Lines Per Inch	
	orrido			Advanced Output	
Login Ov	ennue				
				Output Search Pattern .*[^0-9']{ONE_UP}[^0-9].*	
				Rename Output Pattern	
Source F	ile Overr	de	Search		
				Rese	et Defaults
Paramete	ers				
Prompt	Туре	Description	Required	Value	dit
01	Single	Term	Y	#AR_REFUND_TERM_CODE	dire
02	Single	Assessment date		#sysdate	Single
03	Single	Student ID		Add	Single
04	Single	Application code		Add	Multi
05	Single	Creator ID			
00					
77	Single	Liser ID		Add D	ynamic
07	Single	User ID Batch type		Add D	ynamic
07 08 09	Single Single Single	User ID Batch type Enrollment status		E De	ynamic lete
07 08 09 10	Single Single Single Single	User ID Batch type Enrollment status Full or part time indicator	Y	E De 96	ve Up
07 08 09 10	Single Single Single Single Single	User ID Batch type Enrollment status Full or part time indicator Assessment rule type	Y	Add D E De % Mor R E	ynamic Hete ve Up
07 08 09 10 11 12	Single Single Single Single Single Single	User ID Batch type Enrollment status Full or part time indicator Assessment rule type Accounting detail to print	Y Y Y Y	E Ope 96 De 96 More R More C More	ve Up
07 08 09 10 11 12 13	Single Single Single Single Single Single Single	User ID Batch type Enrollment status Full or part time indicator Assessment rule type Accounting detail to print Report type	Y Y Y Y	E De %6 De %6 More C More T More	ynamic elete ve Up e Down
07 08 09 10 11 12 13 14	Single Single Single Single Single Single Single	User ID Batch type Enrollment status Full or part time indicator Assessment rule type Accounting detail to print Report type Sort order	Y Y Y Y Y	E De %6 De %6 More %6 More %6 More %7 More N More	ynamic Hete ve Up Down
07 08 09 10 11 12 13 14 15	Single Single Single Single Single Single Single	User 10. User 10. Batch type Enrollment status Full or part time indicator Assessment rule type Accounting detail to print Report type Sort order Add invoice collector record	Y Y Y Y Y Y	E De %6 De %6 Mov R Mov C Mov T Mov N N	ynamic Hete Ve Up Down
07 08 09 10 11 12 13 14 15 16	Single Single Single Single Single Single Single Single	User ID Batch type Enrollment status Full or part time indicator Assessment rule type Accounting detail to print Report type Sort order Add invoice collector record Invoice printer	Y Y Y Y Y Y	E De %6 De %6 More %6 More %7 More N More N More	ynamic elete ve Up > Down
07 08 09 10 11 12 13 14 15 16 17	Single Single Single Single Single Single Single Single Single	User ID. Batch type Enrollment status Full or part time indicator Assessment rule type Accounting detail to print Report type Sort order Add invoice collector record Invoice printer Create accounting records	Y Y Y Y Y Y Y	E Open 96 De 96 Moven R Moven C Moven T Moven N Moven Y Moven	ynamic Hete Ve Up
07 08 09 10 11 12 13 14 15 16 17 18	Single Single Single Single Single Single Single Single Single Single Single	User ID Batch type Enrollment status Full or part time indicator Assessment rule type Accounting detail to print Report type Sort order Add invoice collector record Invoice printer Create accounting records Refund by total refund date	Y Y Y Y Y Y	Add D E De % De % More % More C More C More N More N More Y More	ynamic Hete ve Up > Down

TSRCBIL – Refunding Process

				TSRTBI	L-CURRENT_TERM
General	Output	Banner Predecessors	Conditions	Documentatio	n
Program	Informati	on			Banner Output
Drogram		Are which it		* Casab	
Frogram		tsrtbii		Search	Printer NOPRINT Search
Comman	d Name				
Program	Туре	Pro*C		*	Printer Form
Type Cod	le	C *			Lines Per Inch
					Advanced Output
Login Ov	ernae		-		Auvaliced Output
					Output Search Pattern .*[^0-9]{ONE_UP}[^0-9].*
					Rename Output Pattern
Source F	ile Overri	de		Search	
					Reset Defaults
L					
Paramete	ers				
Prompt	Туре	Descriptio	n	Required	Value
01	Single	Selection Identifier			Edit
02	Single	Application Code			
03	Single	Creator Id			Add Single Pi
04	Single	Term		Y	#AR_REFUND_TERM_CODE
05	Single	Address Selection Date		Y	#sysdate Add Muld
06	Multi	Address Hierarchy		Y	1MA 2RE 3BI Add Dynamic
07	Single	Contract ID			
08	Single	Contract Number			% Delete
09	Single	Futures Print Date			
10	Single	Currency Code		X	Move up
12	Single	Apply Third Party Deposite Ind		Y	Move Down
12	Single	Print Future Detail Indicator		T N	V V
14	Single	Print Order		- ·	NI NI
15	Single	Billing Date		Ý	N Svedate
16	Single	Days in Billing Cycle		Ý	30
17	Single	Minimum Acct Balance		Y	-9999999.99
18	Single	Detail Codes to Bill(% valid)		Y	%
19	Single	Affect Amount Due Indicator		Y	Y
20	Single	Print Only Required Course		Y	N



Refunding Process for Finance Department

- Each process uses conditions to send notification to users.
- Output is included in notifications.
- Notifications can be custom made with:
 - Substitution Variables
 - Internal Job ID variables.
 - Custom Text
 - Standard messages.



TSRCBIL – Notification Process

T SRTBIL-CURRENT_TERM						
General O	utput Banner Pr	edecessors Condition	ons Documentation			
Order	Timing	Performed	Condition#1	Qual	Condition#2	
1	AFTER	ONCE	{status}	=	FINISHED	SEND N
2	AFTER	ONCE	{status}	!=	FINISHED	SEND N

Test	O DET DET TED
Test	
If {sta	itus}
Action	
Then	SEND NOTIFICATION AR_TSRTBIL_NOTIFY F Details
	Action Timing
	The first time the condition is true
	○ Every time the condition is true
	O Disabled



TSRCBIL – Notification Process

Institution Detail
Frequency
First Time Every Time
Status Trigger
○ Aborted ● Finished ○ Deleted ○ Failed To Start ○ Hold ○ Running ○ Completed ○ Queued ○ Requested ○ Restart Finished ○ Condition
Message Text
○ <u>T</u> emplate
● <u>C</u> ustom Text
mated notification. Please do reply to this email as this email is not monitored.** ▼ ◀
Subject {task} is {status} The job id is {#BAN-ONEUP-history} * {}
Email Output Device
Email Recipients somebody@sjcd.edu Select
Email Attachments
○ None ○ System Output ○ Other Output ③ All Output ○ Pattern ③ Normal ○ In Body ○ Zip ○ pdf
Attach System Output As Image: Constraint of the part of
✓ OK X Cancel



- Process to load the ISIR Files such as:
 - IDSAXXOP
 - IGSGXXOP
 - IGDSXXOP
 - IGCOXXOP
- Uses Custom script to automate the download of ISIR files.
- Custom scripts are used to manipulate files by removing header and trailer records.
- Process is scheduled to run daily.

💠 Process Flows: FA_DATALOAD_IDSA_2223 🛛 🖉				
General Components Output Schedule Prompts Conditions Documentation User Groups				
Eile Edit View Options Predecessors Simulation	TDCLIENT_PROCESS			
Elle Edit View Options Predecessors Simulation	IDCLIENT_PROCESS Job Description Tdclient Transfer Process Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active Alias TDCLIENT_PROCESS Y Job Active			
	✓ OK ✓ Apply ▶ Request X Cancel ? Help			



- TDClient script is used to specify the exact message class to download.
- Additional scripts are used to remove header and trailer records.
- Copy file scripts are used to load file to dataload directory.
- Banner jobs to handle the dataload procedures are executed.
- All output is emailed to financial aid staff.





	TDCLIENT PROCESS			
Ge	General Output Prompts Predecessors Conditions Documentation			
-				
#	Description	Default	Value	Re Select
1	Reset Option	Y	Y	Υ
2	Transmission Command	Т	R	Y {}
3	Path & File Name		{#TDClient_Directory}/incoming/{#	Υ
4	Message Class		{#3}	Y
5	TG Destination Number		TG53689	Y
			·	



TDClient Script variables

General Output Prompts Predecessors Conditions Documentation # Description Default Value Re Select 1 Reset Option Y Y Y 2 Transmission Command T R Y 3 Path & File Name {#TDClient_Directory}/incoming/{# Y 4 4 Message Class {#3} Y 5 TG Destination Number TG53689 Y		TDCLIENT_PROCESS			
# Description Default Value Re 1 Reset Option Y Y Y 2 Transmission Command T R Y 3 Path & File Name {#TDClient_Directory}/incoming/{# Y Y 4 Message Class {#3} Y 5 TG Destination Number TG53689 Y	Gen	eral Output Prompts Predecessors	Conditions Documentation		
	# 1 2 3 4 5	Description Reset Option Transmission Command Path & File Name Message Class TG Destination Number	Default Y T	Value Y R {#TDClient_Directory}/incoming/{# {#3} TG53689	Re Select Y {} Y {} Y {} Y {}

Remove Header Script parameters

Process Flows: FA_DATALOAD_IDSA_2223	
eneral Components Output Schedule Prompts Conditions Docume	entation / User Groups
le Edit View Options Predecessors Simulation	REMOVE_HEADER
	General Output Prompts Predecessors Conditions Documentation
	# Description Default Value Re Select
	1 Path & File Name (#TDClient_Directory)/incoming/(# N
- FA_DATALOAD_IDSA_2223	
TDCLIENT PROCESS	
REMOVE_HEADER C	
RCPTP23	
DODUTOU	
REPMICH	
RCRTP23	
WPPALTD	
	VOK V Apply Request Cancel ? Help
	· ···· ···· ··························

Remove Header Script parameters

Process Flows: FA_DATALOAD_IDSA_2223	
eneral Components Output Schedule Prompts Conditions Docume	entation / User Groups
le Edit View Options Predecessors Simulation	REMOVE_HEADER
	General Output Prompts Predecessors Conditions Documentation
	# Description Default Value Re Select
	1 Path & File Name (#TDClient_Directory)/incoming/(# N
- FA_DATALOAD_IDSA_2223	
TDCLIENT PROCESS	
REMOVE_HEADER C	
RCPTP23	
DODUTOU	
REPMICH	
RCRTP23	
WPPALTD	
	VOK V Apply Request Cancel ? Help
	· ···· ···· ··························

RCPMTCH parameters

A Bracass Flows: FA DATALOAD IDSA 2222		M	
General Components Output Schedule Promote Conditions Docume	tation ⁷ Hear Groupe		
Ceneral Components Curput Schedule Prompts Conditions Docume			
File Edit View Options Predecessors Simulation	General Output Banner Predecessors Conditions Documentation		
🔚 🛴 🚰 📮 🧲 🖕 Scale: 💶 🔳 🕨	Program Information Banner Output	1	
FA_DATALOAD_IDSA_2223	Program reprinter NOPRINT	Sea	
	Command Name Printer Form V Add	Delete	
TDCLIENT_PROCESS C	Program Type Pro*C *		
REMOVE HEADER	Type Code C *		
	Login Override Advanced Output		
COPY_FILE	Output Search Pattern .*[^0-9]{ONE_UP}	^0-9].*	
Deptpoo	Rename Output Pattern		
RUFIF23	Source File Override Search		
СРМТСН		Reset Defaults	
	Parameters		
RCRTP23	Prompt Type Description Required Value		
WPPALTD	01 Single Aid Year Code Y #1	Edit	
	02 Single Data Source Code Y EDE	Add Single	
	04 Single Value for New Students Y N		
	05 Single Sort Order Indicator N	Add Multi	
	06 Single Common Matching Source Code Y FA EDE DATA LOAD	Add Dynamic	
		Delete	
		Manalla	
		Move up	
		Move Down	
		•	
	V OK V Apply Pequest X Cancel	? Help	



Thank you for attending

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