

Train the Trainer Modules: Manage Stipends

7.2.5 Manage Stipends

Stipend Action Reasons

Following are the stipend actions and the reasons of specific stipend action:

[**Note:-** Please explore the sub sections of this chapter to view how this process works to manage the following stipend actions]

Stipend Actions			Stipend Reasons						
Stipend Action	Description	Severity	Institution	Action	Reason	Description	Short Description	Prg Sts	Acad Std
PEND	Pending Manual	0	KSAU	ACTV	ACTV	Stipend Activate	Activate	y	
ACTV	Active	1	KSAU	ACTV	GOOD	Good Academic Standing	Good Stand		y
HOLD	Hold	2	KSAU	DACT	DCES	Deceased	Decease	y	
SSPN	Suspend	3	KSAU	DACT	DISM	Dismissal	Dismiss	y	y
DACT	De Active	4	KSAU	DACT	GRAD	Graduated	Graduate	y	
			KSAU	HOLD	LEAV	Leave of Absence	Leave	y	
			KSAU	HOLD	WRN1	Warning 1	Warn 1		y
			KSAU	SSPN	DISC	Discontinue	Discontin	y	
			KSAU	SSPN	PROB	Probation	Probation		y
			KSAU	SSPN	SSPN	Suspend	Suspend	y	
			KSAU	SSPN	WRN2	Warning 2	Warn 2		y
			KSAU	SSPN	WRN3	Warning 3	Warning 3		y
			KSAU	SSPN	WTHW	Withdrawal	Withdraw	y	
Note:									
Higher the severity Higher the Priority: For Resolving Stipend Status by referring to Program Status and Academic Standings									
Lower the severity Higher the Priority: For Resolving Stipend Status by referring to Multiple Programs rows									

➤ Report: Stipend Activation for Students

Following are the brief summary of steps that you required to run report of students stipend activation:

(**Note:-** Click on "See It" button to view the interactive slideshow of the following steps)

Pre-Requisites

The following pre-requisites must be fulfilled before generating report.

N/A

Summary of Steps

1. Login to system using your credentials
2. Go to page: Main Menu > Reporting Tools > Query > Query Viewer
3. Select Query "KS_SF_STIPEND_ELIGIBLE_STUDENT"
4. Following are two alternate option of executing queries based on load.
5. For medium size data: (Recommended)
6. Select "Excel" option.
7. Enter Business Unit as KSAU and press View Results button. Review the opened Excel file.
8. For heavy data: (Alternate option if recommended option does not work)
9. Use "Schedule" option. Goto "Add a New Value" tab and enter a new Run Control Id in a format "StipendElig-YYYYMMNN_#" e.g. StipendElig-20131102_1. Note: YYYYMMNN is for current date and # is a running number within a day.
10. Enter Business Unit as KSAU,

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11. Enter Description same as Run Control Id. Press OK.
12. On Process Scheduler Request, Select Format 'XLS' and press OK
13. Go to page: Main Menu>PeopleTools>Process Scheduler>Process Monitor
14. Select the latest process PSQUERY and select Details. Verify your Run Control Id and run date time.
15. Select View Log/Trace
16. Copy the *.xls file to your computer. Open the file and review the results.
17. Review and filter out the report result for stipend activation. It contains students active in a program with Inactive Stipend Row or without Stipend Row.

➤ **Activate Student Stipends**

Following are the brief summary of steps that you required to run report of students stipend activation:

(**Note:-** Click on "See It" button to view the interactive slideshow of the following steps)

Pre-Requisites

The following pre-requisites must be fulfilled before activate student stipends.

N/A

Summary of Steps

1. Login to system using your credentials (username and password)
2. Go to page: Main Menu > Student Financials > Stipend > Student Stipend Maintenance
3. Select Add a New Value tab.
4. Enter Business Unit as KSAU
5. Enter Id (of student requiring stipend activation).
6. If stipend row exists, following steps:
7. Select the searched Id link
8. Add a new effective date row by clicking "+" button of the scroll.
9. Ensure that Effective Date is set to Current Date and Effective Status is set to "Active"
10. Select "Activate" in Actions dropdown.

➤ **Evaluate and Post Stipend to Student Account**

Following are the brief summary of steps that you required to evaluate and post stipend to student account:

(**Note:-** Click on "See It" button to view the interactive slideshow of the following steps)

Pre-Requisites

The following pre-requisites must be fulfilled before evaluate and post stipend to student account.

N/A

Summary of Steps

1. Login to system using your credentials (username and password)
2. Go to page: Main Menu > Student Financials > Stipend > Update Stipend Process
3. Click Search button and select a Run Control Id.

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4. If none searched then add a new Run Control Id using tab Add a New Value.
5. Select "Schedule" in Run Type drop down.
6. Select "Manual" if want to run process on any date other than current date. (Using Schedule run type is recommended).
7. Enter Business Unit as "KSAU"
8. If want to process for all programs: (Not Recommended from performance perspective)
9. Click on All Programs check box.
10. If want to process for selective programs.(Recommended)
11. Select Program using prompt.
12. If want to add more program then add a new row by clicking "+" button of the grid.
13. Repeat Step-11 to Step-12, else proceed to next step.
14. Click "Save" button.
15. Click "Run" button.
16. On Process Scheduler Request click OK
17. Go to page: Main Menu>PeopleTools>Process Scheduler>Process Monitor
18. Click on the Refresh button and monitor the "Run Status" and Distribution Status normally end with values "Success" and "Posted" respectively.
19. In case Run Status is set to "No Success" then following steps can be followed to check the trace file and sent it to support staff.
20. Select the latest process KS_SF_STPUPD and select Details. Verify your Run Control Id and run date time. Proceed if verification succeeds.
21. Select View Log/Trace
22. Copy/open the file with name in format "AE_KS_SF_STPUPD_#.stdout" (where # is process instance number).
23. Review the file and if required send it to the support staff in case of "No Success" run status.
24. Go to page:Main Menu > Student Financials >Stipend >Calculate Stipend Process
25. Click Search button and select a Run Control Id.
26. If none searched then add a new Run Control Id using tab Add a New Value.
27. Select current Year-Month for Stipend Calculation.
28. Enter Accounting Date for posting Stipend Item Amounts to Student Account.
29. Enter Business Unit as "KSAU" if not selected.
30. Enter Group using prompt.
31. Enter Career using prompt.
32. Enter Program using prompt.
33. Enter Plan using prompt. (*ALL means all qualified plans)
34. Select Run Status as "Calculate". (For generating stipend calculation for review and later for posting)
35. Select "Save" Button
36. Select "Run" Button
37. On Process Scheduler Request click OK
38. Go to page: Main Menu>PeopleTools>Process Scheduler>Process Monitor
39. Click on the Refresh button and monitor the "Run Status" and Distribution Status normally end with values "Success" and "Posted" respectively.
40. In case Run Status is set to "No Success" then following steps can be followed to check the trace file and sent it to support staff.
41. Select the latest process KS_SF_STPCL and select Details. Verify your Run Control Id and run date time. Proceed if verification succeeds.
42. Select View Log/Trace
43. Copy/open the file with name in format "AE_KS_SF_STPCL_#.stdout" (where # is process instance number).
44. Review the file and if required send it to the support staff in case of "No Success" run status.

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45. Follow Section (Review Student Stipend Status Report)

Following step should be performed at the month end. The Calculate Stipend Process must be run at least once for the selected Year-Month.

1. Follow from Step-19 to Step-40 with one exception for Step-29 select “Finalize” as Run Status.
2. For Posting to Student Account: Follow from Step-19 to Step-40 with one exception for Step-29 select “Post” as Run Status.
3. After posting the successfully posted data can be viewed in the View Customer Account page.

➤ Review Students Stipend Status Report

Following are the brief summary of steps that you required to review students stipend status report:

(**Note:-** Click on "See It" button to view the interactive slideshow of the following steps)

Pre-Requisites

The following pre-requisites must be fulfilled before review student stipend status report.

N/A

Summary of Steps

1. Login to system using your credentials (username and password)
2. Go to page: Main Menu>Reporting Tools>Query>Query Viewer
3. Select Query “KS_SF_STIPEND_CALC_REVIEW”
4. Following are two alternate option of executing queries based on load.
5. For medium size data: (Recommended)
6. Select “Excel” option.
7. Enter Business Unit as KSAU appropriate Month and press View Results. Review the opened Excel file.
8. Select Year of Year-Month for which Stipend calculation review is required.
9. Select Month of Year-Month for which Stipend calculation review is required.
10. For heavy data: (Alternate option if recommended option does not work)
11. Use “Schedule” option. Goto “Add a New Value” tab and enter a new Run Control Id in a format “StipendCalc-YYYYMMNN_#” e.g. StipendCalc-20131102_1. Note: YYYYMMNN is for current date and # is a running number within a day.
12. Enter Business Unit as KSAU
13. Select Year of Year-Month for which Stipend calculation review is required.
14. Select Month of Year-Month for which Stipend calculation review is required.
15. Enter Description same as Run Control Id. Press OK.
16. On Process Scheduler Request, Select Format ‘XLS’ and press OK
17. Go to page: Main Menu>PeopleTools>Process Scheduler>Process Monitor
18. Select the latest process PSQUERY and select Details. Verify your Run Control Id and run date time.
19. Select View Log/Trace
20. Copy the *.xls file to your computer. Open the file and review the results.
21. Review and filter out the report result which requires Stipend Maintenance. The rows which are not selected for calculation may be due to various reasons, one of the main reasons could be student is not term activated. A rear reason could only occur in case new Academic Standing code is used whose mapping is not setup.

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➤ View and Maintain Students Stipend

Following are the brief summary of steps that you required to view and maintain students stipend:

(Note:- Click on "See It" button to view the interactive slideshow of the following steps)

Pre-Requisites

The following pre-requisites must be fulfilled before view and maintain student stipend.
N/A

Summary of Steps

1. Login to system using your credentials
2. Go to page: Main Menu > Student Financials > Stipend > Student Stipend Maintenance
3. On search screen, enter Business Unit as KSAU
4. Search a student Id for stipend view and maintenance using search options: Business Unit, Id, National ID, Campus ID, Last Name, First Name.
5. Select the searched Id link
6. The student stipend maintenance row is shown for view and maintenance
7. For review, the page shows the execution run-time parameters selection snapshot of the Processes: Update Stipend and Calculate Stipend.
8. If any change is required then follow the following steps.
9. Add a new effective date row by clicking "+" button of the scroll.
10. Ensure that Effective Date is set to Current Date and
11. If required, Apply change to Effective Status. Both Update Stipend Process and Calculate Stipend Process uses this field to determine the student selection.
12. If required, Apply changes to Action drop down.
13. If required, Apply changes to Action drop down.
14. OPTIONAL from here on for Overridden Stipend Rates.
15. If want to set overridden stipend rates, then select Override Flag.
16. In Override Item box, select "STP" in Account Type using prompt.
17. Select Item Type using prompt.
18. Enter non-zero Item Amount.
19. If want to add more overridden Item then add a row by clicking "+" button of the grid.
20. Repeat from Step-14 to Step-18, or proceed to next step for Save.
21. Click Save.