

Business Process Procedures

5.30 COPY TERM PROCESS

Overview These procedures walk the Controller's Office through the steps necessary to copy GL Interface information from term to term for SF Item Types.

Key Points Terms should be copied to/from a comparable term – Spring to Spring, Summer to Summer, Fall to Fall.

AP Dist and Defer information does not copy from one term to another, and must be manually entered.

Part 1 – Run Copy Term Process

Detailed Directions

Navigation [Main Menu](#) > [Set Up SACR](#) > [Product Related](#) > [Student Financials](#) > [Copy Term](#)

FIRST-TIME USERS: If this is the first time you have run the Copy Term process, you must add a run control. Continue with Step 1.1.

REPEAT USERS: If you have previously run the Copy Term process, continue with Step 1.4.

Step 1.1 Navigate to the GL Term Copy page. A dialog window displays.

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


Run Control ID:

Case Sensitive

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

Step 1.2 Click [Add a New Value](#) .

Step 1.3 Enter a name for your Run Control ID and click . Continue with Step 1.5.

GL Term Copy


Find an Existing Value
Add a New Value

Run Control ID:

Add

[Find an Existing Value](#) | [Add a New Value](#)

Detailed Directions if You Have Previously Run the Report.

Step 1.4 If you have previously run this process, type in the name of your Run Control ID or click  to search for your run control. Double click on the correct run control.

Register Totals

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

Find an Existing Value
Add a New Value

Search by: Run Control ID begins with

Case Sensitive

Search [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

All users continue with Step 1.5.

Step 1.5 The GL Term Copy page appears.

GL Term Copy

Run Control ID: gl-term-copy [Report Manager](#) [Process Monitor](#) Run

Parameters

SetID:



From Term: 2005 Fall To Term: 2006 Fall

From Session: To Session:

Check one or more Item Types for Copy


<input type="checkbox"/> Application Fee	<input type="checkbox"/> Billing Only	<input checked="" type="checkbox"/> Original Charge	<input type="checkbox"/> Deposit
<input type="checkbox"/> Financial Aid	<input type="checkbox"/> Withholding	<input type="checkbox"/> Interest	<input type="checkbox"/> Payment
<input checked="" type="checkbox"/> Refund	<input checked="" type="checkbox"/> Waiver	<input type="checkbox"/> Pay Plan Credit	<input type="checkbox"/> Writeoff


Save
 Return to Search
 Previous in List
 Next in List
 Notify
 Add
 Update/Display

Step 1.6 Enter **NV280** as the Business Unit, or click  to lookup.
 Enter the From Term and To Term, or click  to lookup. Terms should be copied from and to like terms: Spring to Spring, Summer to Summer and Fall to Fall.


Step 1.7 Select one or more checkboxes at the bottom of the page:
 Financial Aid Waiver Payment
 Refund Original Charge Writeoff

Note Although more than one item type classification can be copied at one time, choosing multiple types may complicate troubleshooting should the process end in an error.

Step 1.8 Save the page by clicking .

Step 1.9 Click  to initiate the process. The Process Scheduler Request page appears.

- Verify the following on the page:
1. Server Name is PSUNX
 2. The Select checkbox is checked for Copy Term Session
 3. The Type is Web.
 4. The Format is PDF.

Step 1.10 Click  to run the Copy Term process.


Step 1.11 After initiating the process, the GL Term Copy page will reappear.

Step 1.12 Click [Process Monitor](#) and the Process List page will appear.

The screenshot shows the 'Process List' interface. At the top, there are search filters for 'View Process Request For' including User ID (1061608), Type, Last (1), and a Refresh button. Below these are fields for Server, Name, Instance, Run Status, and Distribution Status, with a 'Save On Refresh' checkbox checked. The main area contains a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3574		SQR Report	SFTRMCPY	1061608	08/16/2006 5:48:16PM EDT	Success	Posted	Details
<input type="checkbox"/>	3562		SQR Report	VSPMTDST	1061608	08/16/2006 3:09:01PM EDT	Success	Posted	Details

At the bottom of the screenshot, there are 'Save' and 'Notify' buttons, and a link to 'Go back to GL Term Copy'.

Step 1.13 Periodically click  to refresh the Process Monitor page. Use this page to check the process until it has finished processing and the Run Status for your process shows Success.

Part 2 – Enter Updated AP Dist and Deferred Information


Notes The G/L Term copy function does not copy the AP Dist and Defer information from one term to another. Therefore this information will need to be manually entered for each item type, as required.


The **AP Dist button** is used on the Refund Item Types
 The **Defer button** is used on all appropriate charge item types the College defers: credit and non-credit tuition and fees, etc.

Detailed Directions

Step 2.1 Use Table Setup documentation 260 Item Types for navigation and detailed instructions.

In order to change the data on the panels it is necessary to navigate to the Item Types panel group in correction mode.

Step 2.2 In order to enter the updated AP Dist data, first view the information from a prior comparable term. For example – to update a summer item type, first view the information on a prior comparable summer term. Enter or update the FRS and budget period as appropriate. Click  to save the new data.

Step 2.3 In order to enter the updated Deferred data, first view the information from a prior comparable term. Enter or update the deferred FRS and budget information as appropriate. Click  to save the new data.