Training Materials & Resources

There are a number of resources and training materials available for people who use tools to access University data. Additionally, the University of Maine System has developed and compiled training materials for the PeopleSoft Query tool. Click on the resources below to see what is available, or try the search bar at right. For questions please contact DARTS@maine.edu

**Power BI Overview**
Information and resources for Power BI.

**Process Documents**
Step-by-step instructions to ensure proper data entry.
- Deferred Student Admission Coding
- Academic Interests
- Academic Test Summary
- Financial Aid: Importing a Federal Data File-032608
- Instruction Modes Documentation
- Load Factor Introduction
- MaineStreet Access to Student Data (Campus Solutions)
- Military Leave & Return Procedures
- COVID-19 Withdrawals & Registration Holds
- Preventing Duplicate IDs in MaineStreet Campus Solutions using Search/Match
- Preventing Duplicate IDs in MaineStreet Human Resources using Add a Person
- Course Component Documentation
- COVID-19 Withdrawals & Registration Holds (Prior Information for 2021-2022 Academic Year)
- Course Facility ID Documentation

**PeopleSoft Query Training**
- Beginner PS Query
- Intermediate PS Query
- Advanced PS Query
- Data Access Requests
- PS Query Best Practices
- Troubleshooting PS Query
- Training for Functional Areas

**UMS PS Query Users' Forum**
Join us! If you're not already a member, request access and join over 200 UMS PS Query users! Get helpful tips, ever-expanding resources, and collaborate with others working in the UMS data.

**Data Cookbook Resources**
Information and resources for using the Data Cookbook.
- How to Interact with Definitions in Data Cookbook
- Documenting Processes and Procedures with Data Cookbook & Confluence
- How to Manage Your Data Cookbook Account

**Excel Tips**
User tips for accurately displaying data exported from different tools

**Institutional Research (IR)**
- Creating and Managing a Retention Cohort Group
- Handling Retroactive Withdrawals in Cohort Table
- Institutional Research, Reporting, and Assessment Knowledgebase
- Reporting Standards & Practices

**External Education & Reporting Resources**
These are external organizations with whom we share data for internal analysis and reporting to the wider public. Find links to current instructions, definitions, and due dates.

**Database (MaineStreet) Resources**
- HEUG (Higher Education User Group)
  - PeopleSoft resources for higher ed professionals; join HEUG (by entering University of Maine System as your "Company") for access to forums and resources

**CS Resources**
- Personalizing your MaineStreet Experience
- Financial Aid Resources
- MaineStreet Training Tools - use cautiously

**HR Resources**
- MaineStreet Training Tools - use cautiously
- MaineStreet HR Home Website
- HR Date Definitions

**Financials Resources**
- MaineStreet Training Tools - not in use
- Maine.edu Website Resources for Financials
- MaineStreet Financials IT Home Website (Confluence)

**SQR Support**
Join our SQR Programmers’ Group
How to run SQR Runner jobs
How to Run an SQR Report

**Discoverer Migration Project**
- Overview
- Frequently Asked Questions
- Discover Migration Project Team Members