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Batch Budget Create-040308

Concept

Budgets can be calculated in batch, online for an individual student using batch rules, or manually. Use batch budget assignment to process many students using defined budget assignment rules. Batch budget assignment builds budgets on a term-by-term basis. Budgets are only built for students who have financial aid terms built, and only for those terms where the **Budget Required** field is set to Assgn Bdgt (assign budget).

Procedure

Assigning student budgets in batch requires several steps:

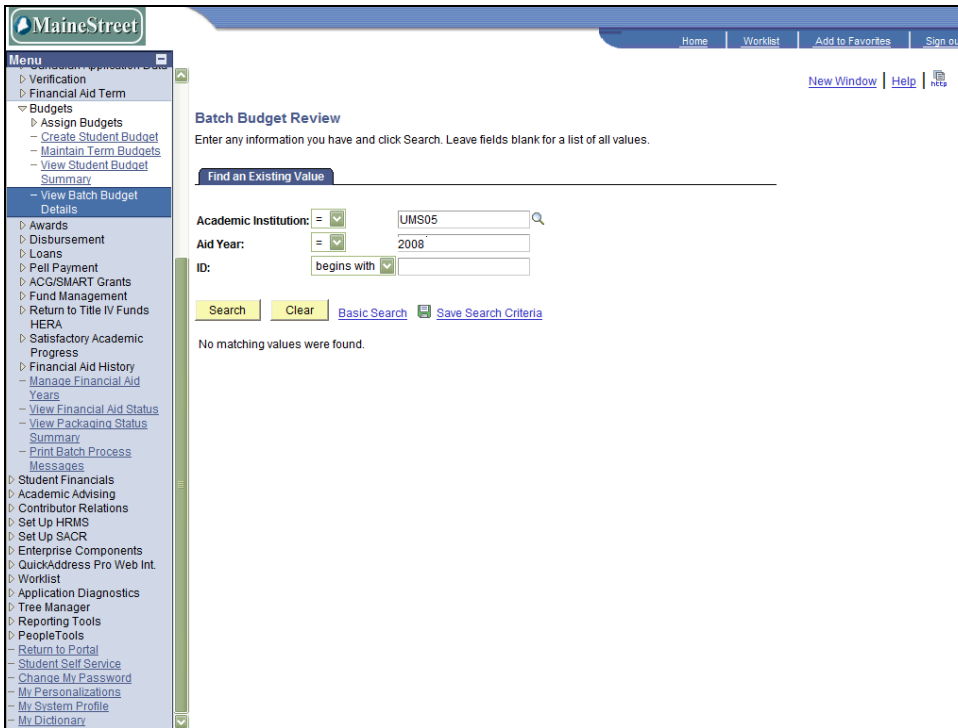
1. Run a process to select the students.
2. Process the budget formulas.
3. Move the budgets to the students.
4. Maintain the budget work tables.

After each step you can view the results in detail by using the **View Batch Budget Details** component.

Before starting with step 1, you should check the work tables to verify that you completed all 4 steps the last time budgets were run. By viewing the work tables you can tell by the students' **Item Status** whether all steps were performed last time, or whether one or more steps remain to be completed for the prior run.

Use the **View Batch Budget Details** component. If no students are found, then all 4 steps were completed in the prior run. If students are found with **Item Status Selected**, then only step 1 was completed in the prior run and you must complete steps 2, 3 and 4. If students are found with **Item Status Found**, then steps 1 and 2 were completed. If **Item Status** is **Moved**, then 1, 2 and 3 were completed. You must run any missing steps before processing more students.

Step	Action
1.	Check the work tables to verify that the last time you ran budgets in batch all 4 steps were complete. Navigate: Financial Aid > Budgets > View Batch Budget Details.



MaineStreet Home Worklist Add to Favorites Sign out

Menu

- Verification
- Financial Aid Term
- Budgets
 - Assign Budgets
 - Create Student Budget
 - Maintain Term Budgets
 - View Student Budget Summary
 - View Batch Budget Details
- Awards
- Disbursement
- Loans
- Fell Payment
- ACQISMART Grants
- Fund Management
- Return to Title IV Funds HERA
- Satisfactory Academic Progress
- Financial Aid History
 - Manage Financial Aid Years
 - View Financial Aid Status
 - View Packaging Status Summary
 - Print Batch Process Messages
- Student Financials
- Academic Advising
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- QuickAddress Pro Web Int.
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- People Tools
 - Return to Portal
 - Student Self Service
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Batch Budget Review

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

Find an Existing Value

Academic Institution:

Aid Year:

ID:

[Basic Search](#)

No matching values were found.

2. Enter your Institution and the Aid Year. Click **Search**.

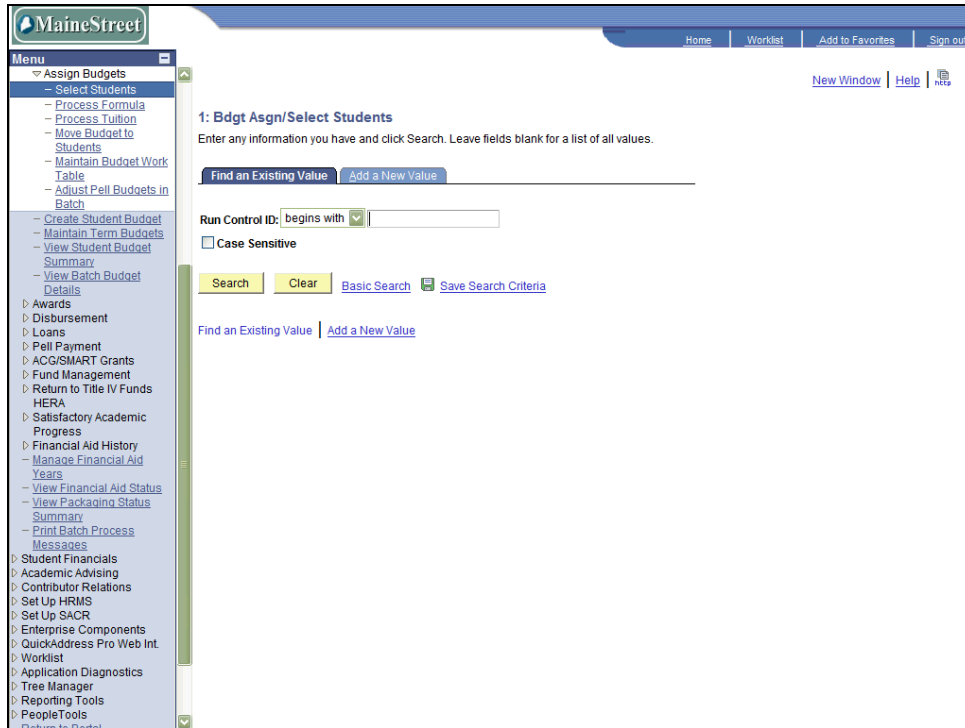
If you see the message "*No matching values were found*" then you know that the prior batch budget run completed all 4 steps and you can proceed to process new budgets.

Otherwise, check the **Item Status** for a student to see which steps need to be completed in the prior run.

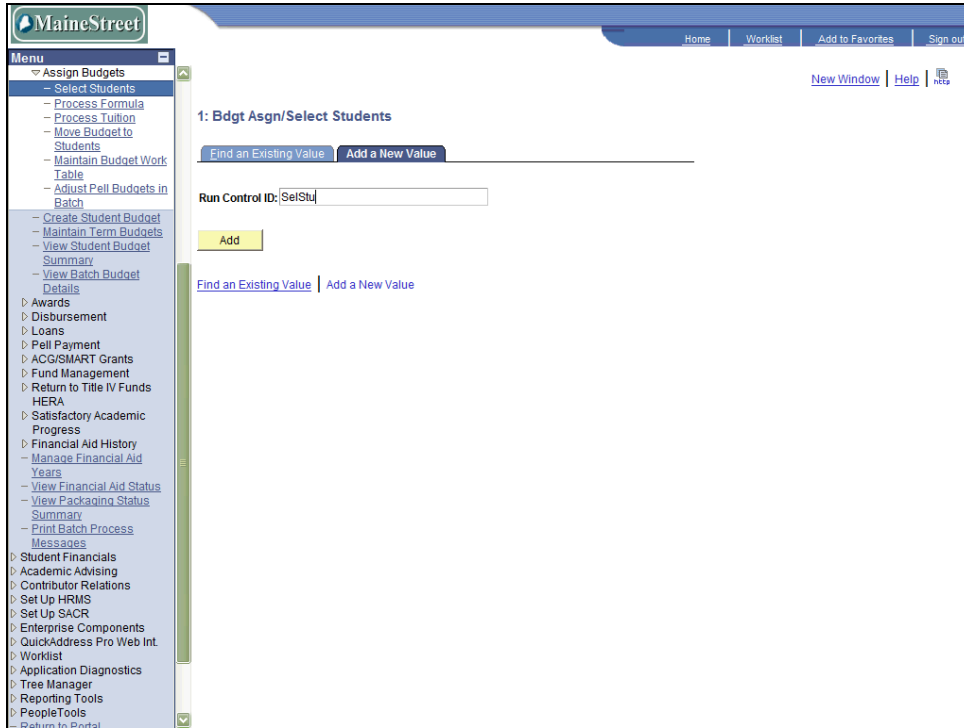
Process Document

Financial Aid: Batch Budget Create-040308


3.	<p>Step 1: Select the Students</p> <p>Navigate: Financial Aid > Budgets > Assign Budgets > Select Students.</p>
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Step	Action
4.	<p>Each of the processes in this procedure requires a Run Control ID. You can use existing Run Control IDs or create a new one for each process.</p> <p>To reuse an existing Run Control ID, click Search and select from the search results list. To create a new one, click the Add a New Value tab.</p>
5.	<p>Enter a name for the new Run Control ID. Do not use blanks.</p>

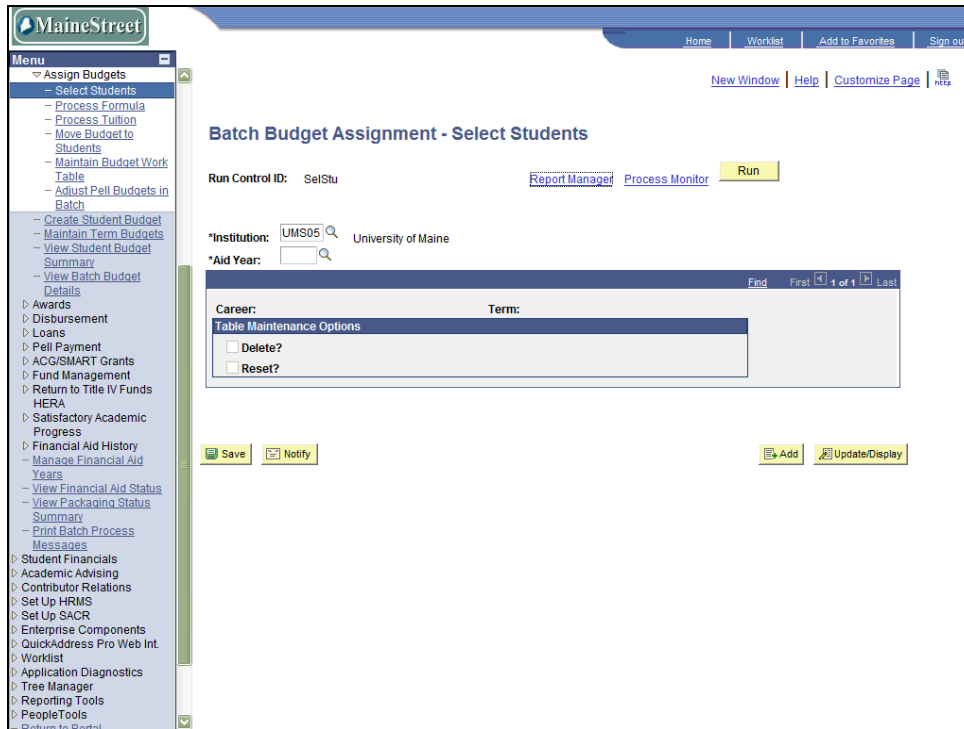



The screenshot shows the 'MaineStreet' web application. On the left is a 'Menu' sidebar with a tree view. The main content area is titled '1: Bdgt Asgn/Select Students'. It features two buttons at the top: 'Find an Existing Value' and 'Add a New Value'. Below these is a text input field labeled 'Run Control ID:' containing the text 'SeiStu'. A yellow 'Add' button is positioned below the input field. At the bottom of the main area, there are two more buttons: 'Find an Existing Value' and 'Add a New Value'. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'.

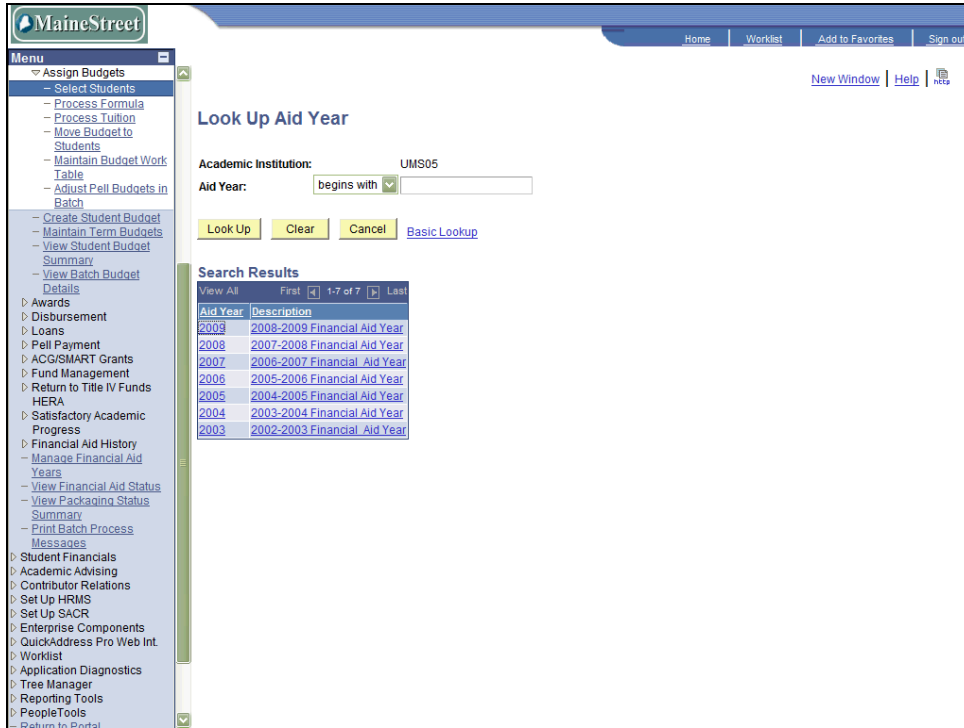
Step	Action
6.	Click Add . 

Process Document

Financial Aid: Batch Budget Create-040308



Step	Action
7.	<p>This process selects students who have the Budget Required field set to <i>Assgn Bdgt</i> on the Financial Aid Info page within FA Term.</p> <p>Make sure that the correct Institution is entered. Select the Aid Year by clicking on the Aid Year look up button.</p> 



The screenshot shows the 'MaineStreet' web application. The main content area is titled 'Look Up Aid Year'. It features a search form with the following fields:

- Academic Institution: UMS05
- Aid Year: begins with [dropdown menu]

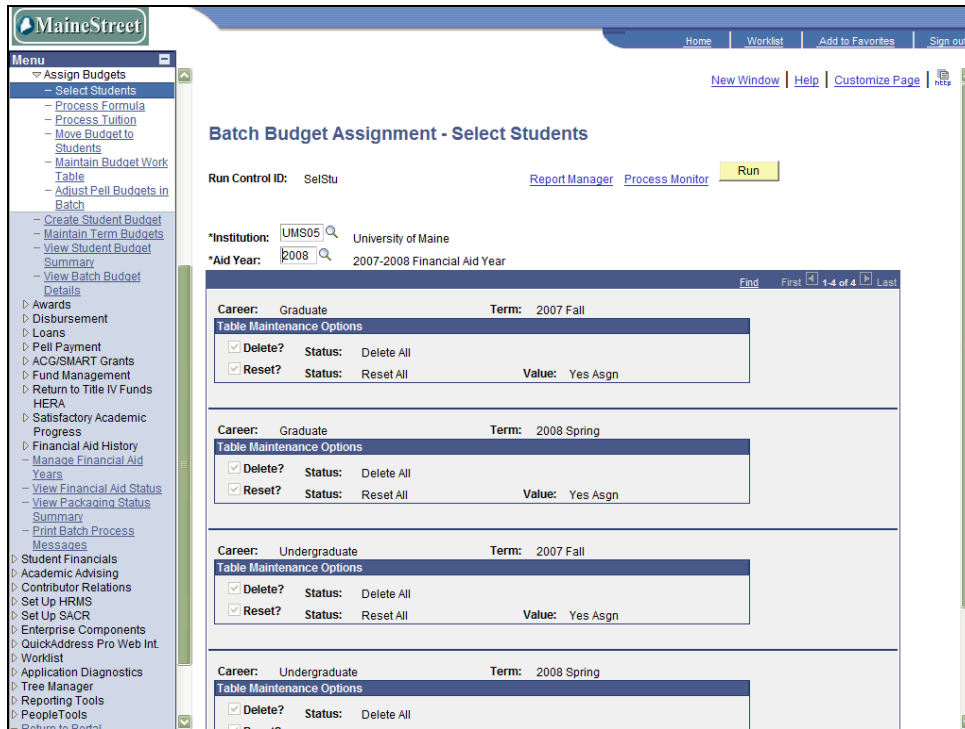
Buttons for 'Look Up', 'Clear', and 'Cancel' are present, along with a link for 'Basic Lookup'. Below the search form is a 'Search Results' section with a table:

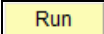
Aid Year	Description
2009	2008-2009 Financial Aid Year
2008	2007-2008 Financial Aid Year
2007	2006-2007 Financial Aid Year
2006	2005-2006 Financial Aid Year
2005	2004-2005 Financial Aid Year
2004	2003-2004 Financial Aid Year
2003	2002-2003 Financial Aid Year

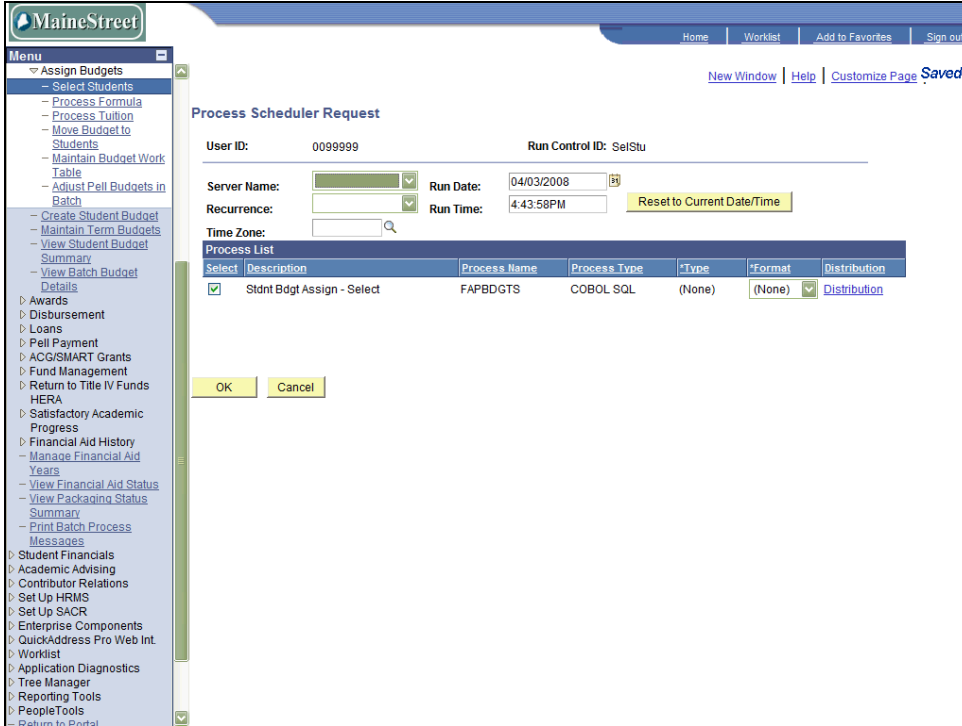
Step	Action
8.	Select the Aid Year from the list. 2008 2007-2008 Financial Aid Year

Process Document

Financial Aid: Batch Budget Create-040308



Step	Action
9.	<p>Selecting the Institution and Aid Year populates the page with the Budget Run Controls your Institution has set up.</p> <p>Click Run.</p> 



MaineStreet Home Worklist Add to Favorites Sign out

New Window Help Customize Page **Saved**

Process Scheduler Request

User ID: 0099999 Run Control ID: SelStu

Server Name: Run Date: 04/03/2008 [B]

Recurrence: Run Time: 4:43:58PM

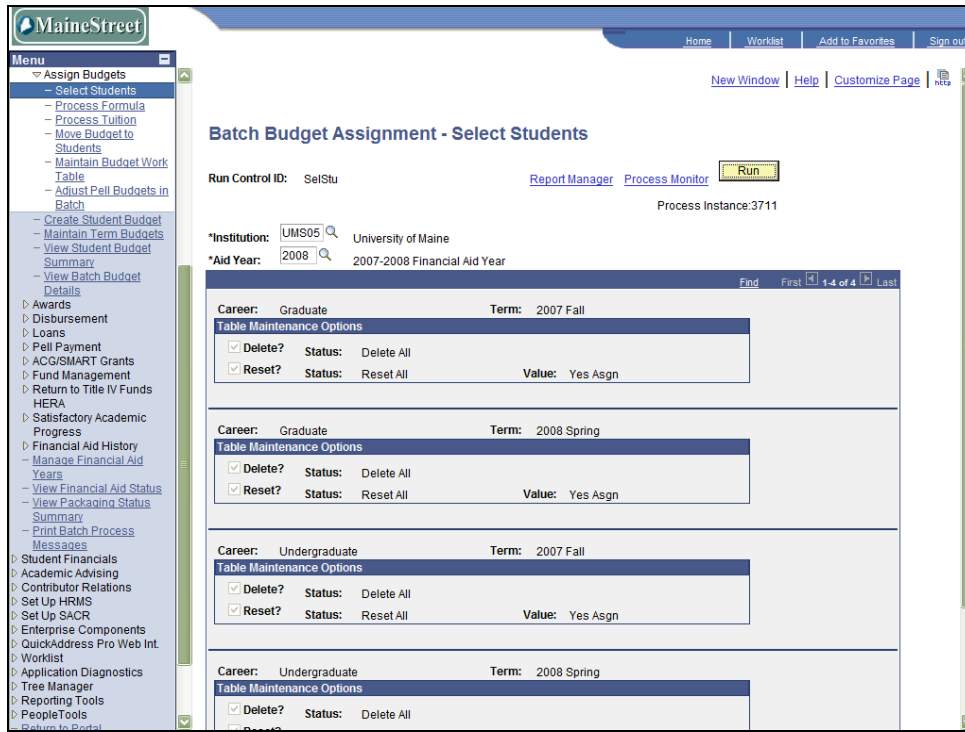
Time Zone:

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Stdnt Edgt Assign - Select	FAPBDGTS	COBOL SQL	(None)	(None)	<input type="button" value="Distribution"/>

Step	Action
10.	Leave the Server Name blank. Click OK . <input type="button" value="OK"/>

Process Document

Financial Aid: Batch Budget Create-040308



MaineStreet Home | Worklist | Add to Favorites | Sign out

Batch Budget Assignment - Select Students

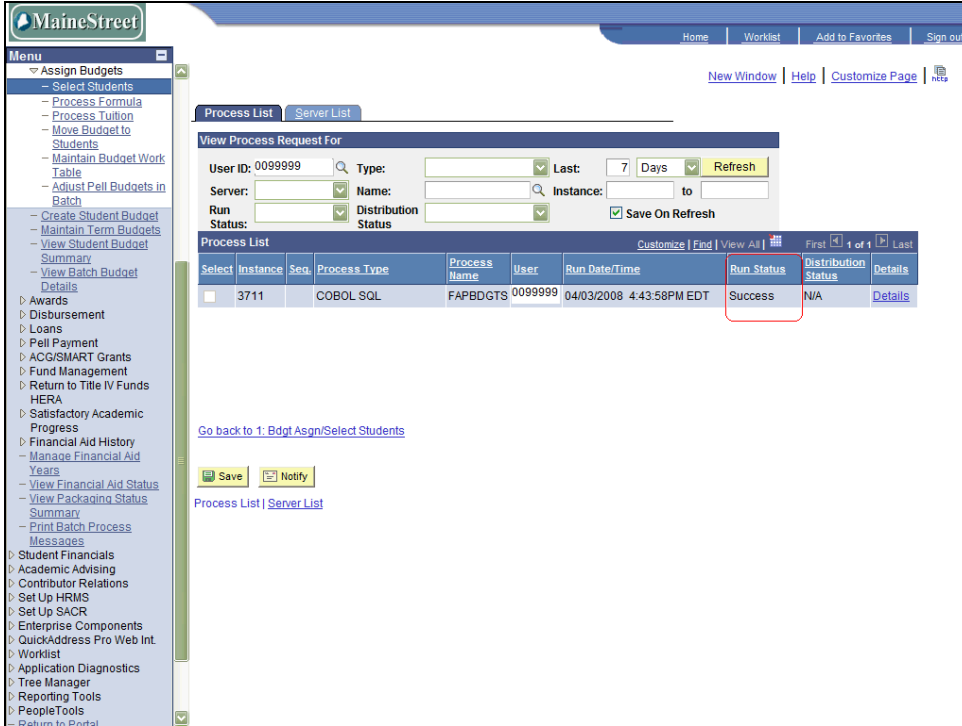
Run Control ID: SelStu [Report Manager](#) [Process Monitor](#) Process Instance:3711

*Institution: UMS05 University of Maine
 *Aid Year: 2008 2007-2008 Financial Aid Year

Find First 1-4 of 4 Last

Career:	Term:
Graduate	2007 Fall
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn
Graduate	2008 Spring
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn
Undergraduate	2007 Fall
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn
Undergraduate	2008 Spring
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All

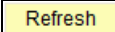
Step	Action
11.	Click the Process Monitor link. Process Monitor



The screenshot shows the 'MaineStreet' application interface. On the left is a 'Menu' with various options like 'Assign Budgets', 'Process Formula', and 'View Financial Aid Status'. The main area is titled 'Process List' and 'Server List'. Below this is a 'View Process Request For' section with fields for 'User ID', 'Server', 'Name', 'Instance', 'Run Status', and 'Distribution Status'. A 'Refresh' button is visible. Below the form is a table with the following data:

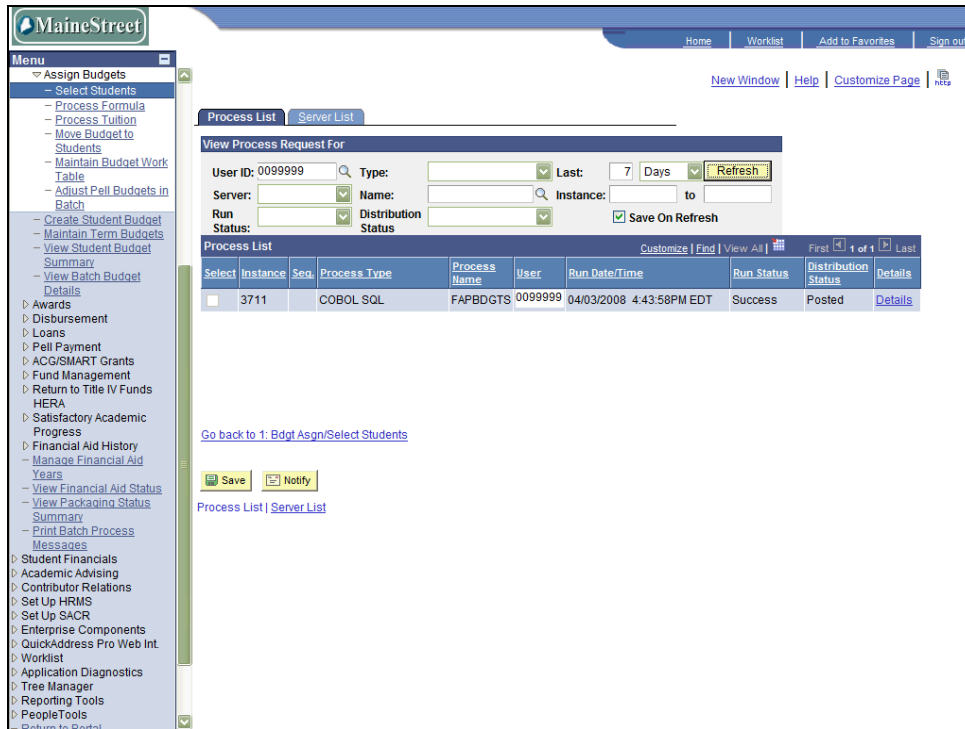
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3711		COBOL SQL	FAPBDGTS	0099999	04/03/2008 4:43:58PM EDT	Success	N/A	Details

Below the table are buttons for 'Save' and 'Notify', and a link 'Go back to 1: Bdgtn/Select Students'. The 'Run Status' and 'Distribution Status' columns in the table are highlighted with a red box.

Step	Action
12.	Click Refresh from time to time until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> . 

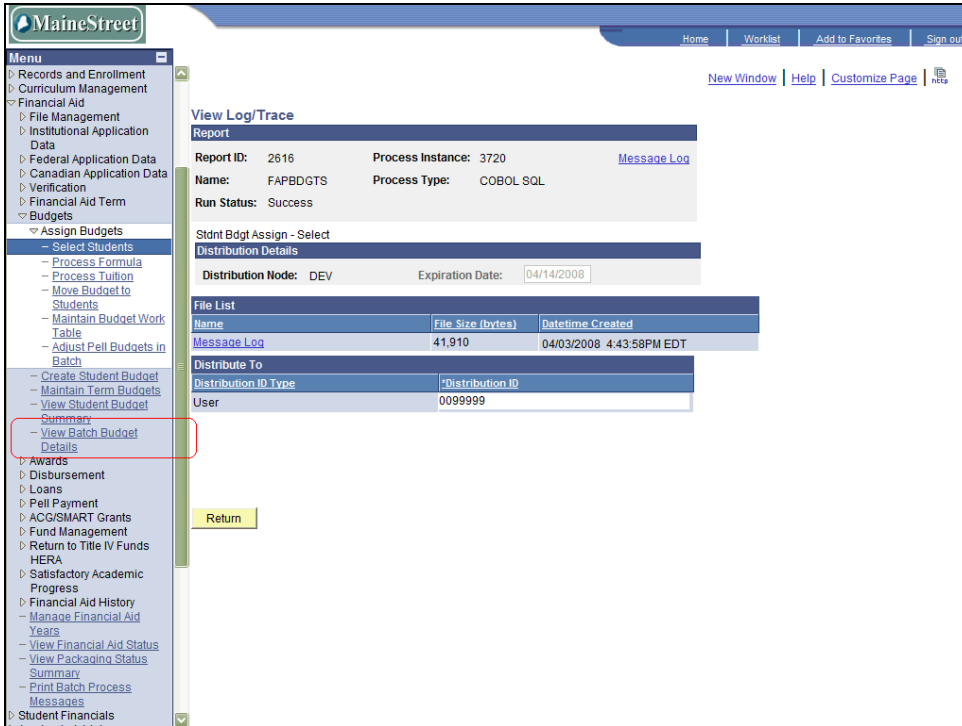
Process Document

Financial Aid: Batch Budget Create-040308



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Assign Budgets', 'Awards', 'Loans', 'Pell Payment', 'ACG/SMART Grants', 'Fund Management', 'Return to Title IV Funds', 'HERA', 'Satisfactory Academic Progress', 'Financial Aid History', 'Manage Financial Aid Years', 'View Financial Aid Status', 'View Packaging Status', 'Summary', 'Print Batch Process Messages', 'Student Financials', 'Academic Advising', 'Contributor Relations', 'Set Up HRMS', 'Set Up SACR', 'Enterprise Components', 'QuickAddress Pro Web Int.', 'Worklist', 'Application Diagnostics', 'Tree Manager', 'Reporting Tools', and 'PeopleTools'. The main content area is titled 'Process List' and includes a 'View Process Request For' form with fields for User ID (0099999), Type, Last (7 Days), Server, Name, Instance, Run Status, and Distribution Status. Below the form is a table with columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains one row with Instance 3711, Process Type COBOL SQL, Process Name FAPBDGTS, User 0099999, Run Date/Time 04/03/2008 4:43:58PM EDT, Run Status Success, and Distribution Status Posted. There are 'Save' and 'Notify' buttons below the table, and a link to 'Go back to 1: Bdgt Asgn/Select Students'.

Step	Action
13.	If desired, view the Message Log from the process. To do that, click the Details link, and in the Process Detail page, click View Log/Trace . Details
14.	Click View Log/Trace . View Log/Trace



View Log/Trace

Report

Report ID: 2616 Process Instance: 3720 [Message Log](#)

Name: FAPBDGTS Process Type: COBOL SQL

Run Status: Success

Stdnt Bdg Assign - Select

Distribution Details

Distribution Node: DEV Expiration Date: 04/14/2008

File List

Name	File Size (bytes)	Datetime Created
Message Log	41,910	04/03/2008 4:43:58PM EDT

Distribute To

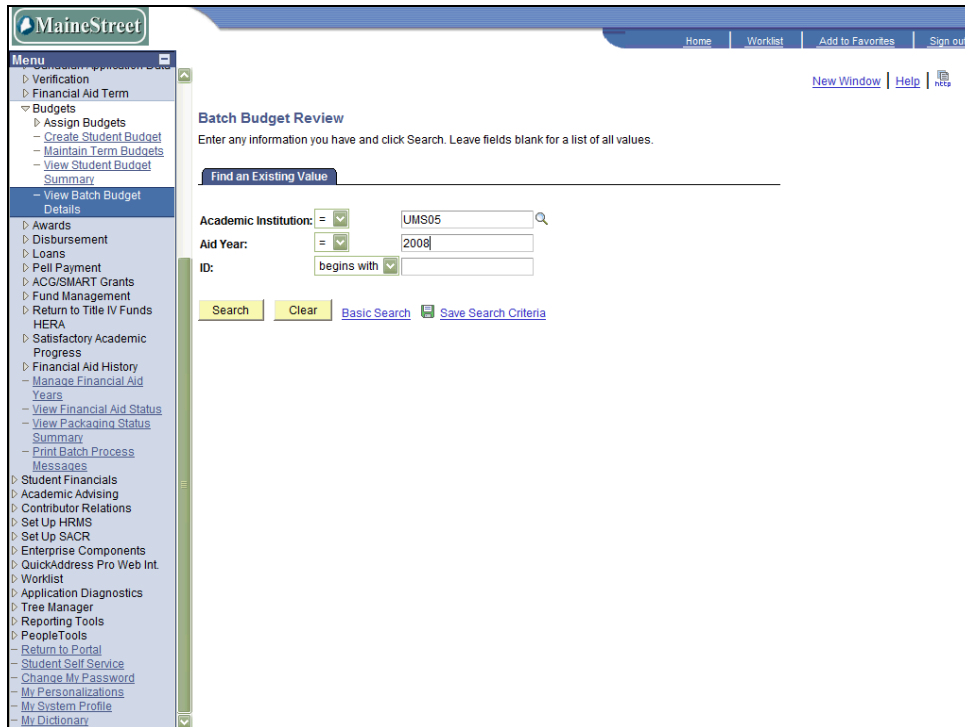
Distribution ID Type	Distribution ID
User	0099999

[Return](#)

Step	Action
15.	<p>To view details of the student selection, use the View Batch Budget Details component.</p> <p>Navigate to View Batch Budget Details.</p> <p>View Batch Budget Details</p>


Process Document

Financial Aid: Batch Budget Create-040308



MaineStreet

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | 

Menu

- ▷ Verification
- ▷ Financial Aid Term
- ▷ Budgets
 - ▷ Assign Budgets
 - Create Student Budget
 - Maintain Term Budgets
 - View Student Budget Summary
 - View Batch Budget Details
- ▷ Awards
- ▷ Disbursement
- ▷ Loans
- ▷ Pell Payment
- ▷ ACG/SMART Grants
- ▷ Fund Management
- ▷ Return to Title IV Funds
 - HERA
- ▷ Satisfactory Academic Progress
- ▷ Financial Aid History
 - Manage Financial Aid Years
 - View Financial Aid Status
 - View Packaging Status
 - Summary
 - Print Batch Process Messages
- ▷ Student Financials
- ▷ Academic Advising
- ▷ Contributor Relations
- ▷ Set Up HRMS
- ▷ Set Up SACR
- ▷ Enterprise Components
 - ▷ QuickAddress Pro Web Int
- ▷ Worklist
- ▷ Application Diagnostics
- ▷ Tree Manager
- ▷ Reporting Tools
- ▷ PeopleTools
 - Return to Portal
 - Student Self Service
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Batch Budget Review

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

Find an Existing Value

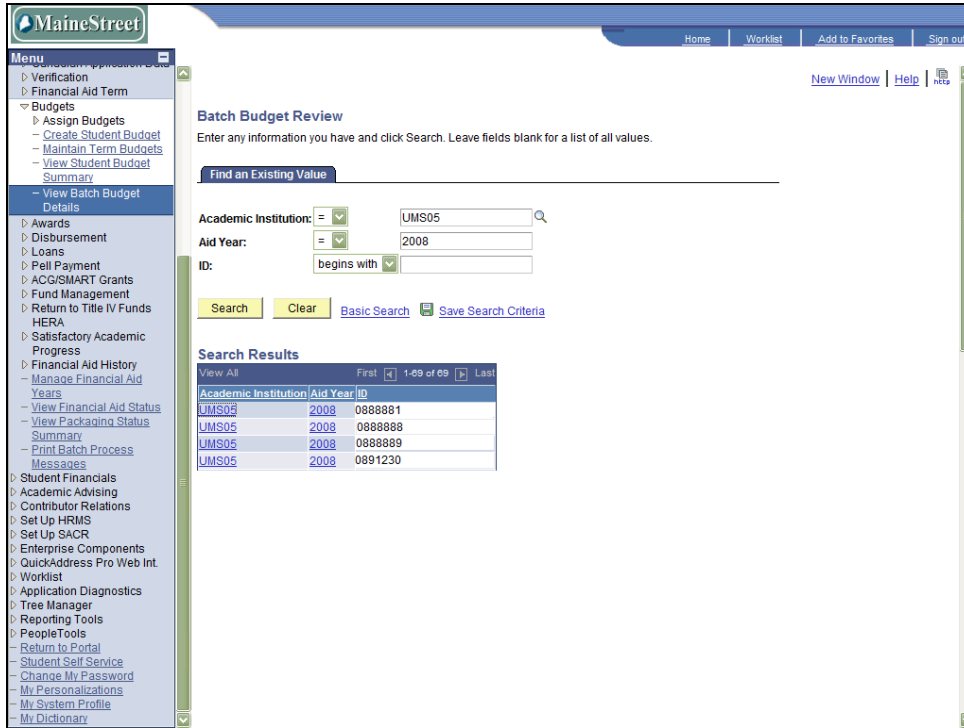
Academic Institution:

Aid Year:

ID:

[Basic Search](#)

Step	Action
16.	Enter the correct Institution and Aid Year and click Search to bring up a list of the selected students. <div style="border: 1px solid black; padding: 5px; margin-top: 10px; display: inline-block;"> <input type="button" value="Search"/> </div>



MaineStreet Home Worklist Add to Favorites Sign out

Menu

- Verification
- Financial Aid Term
- Budgets
 - Assign Budgets
 - Create Student Budget
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 - View Student Budget Summary
 - View Batch Budget Details
- Awards
- Disbursement
- Loans
- Fell Payment
- ACGSMART Grants
- Fund Management
- Return to Title IV Funds HERA
- Satisfactory Academic Progress
- Financial Aid History
 - Manage Financial Aid Years
 - View Financial Aid Status Summary
 - View Packaging Status Summary
 - Print Batch Process Messages
- Student Financials
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Batch Budget Review

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

Find an Existing Value

Academic Institution:

Aid Year:

ID:

[Basic Search](#)

Search Results

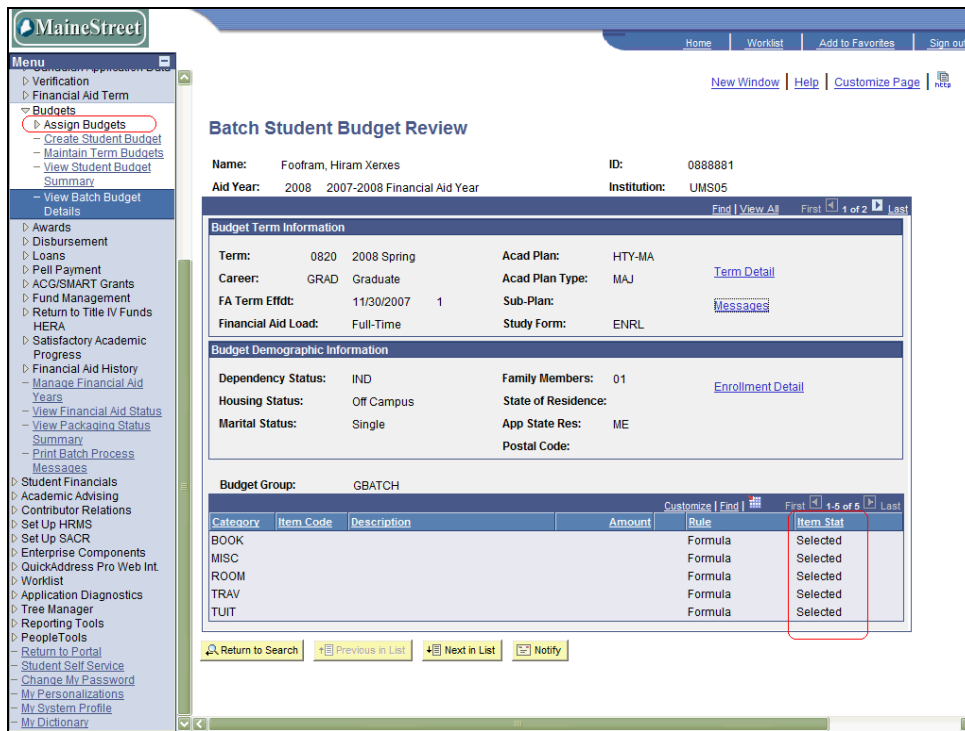
View All First 1-89 of 89 Last

Academic Institution	Aid Year	ID
UMS05	2008	0888881
UMS05	2008	0888888
UMS05	2008	0888889
UMS05	2008	0891230

Step	Action						
17.	Select a student from the Search Results list.						
	<table border="1"> <thead> <tr> <th>Academic Institution</th> <th>Aid Year</th> <th>ID</th> </tr> </thead> <tbody> <tr> <td>UMS05</td> <td>2008</td> <td>0888881</td> </tr> </tbody> </table>	Academic Institution	Aid Year	ID	UMS05	2008	0888881
Academic Institution	Aid Year	ID					
UMS05	2008	0888881					

Process Document

Financial Aid: Batch Budget Create-040308



Batch Student Budget Review

Name: Fooram, Hiram Xenex ID: 0888881
 Aid Year: 2008 2007-2008 Financial Aid Year Institution: UMS05

Budget Term Information

Term:	0820 2008 Spring	Acad Plan:	HTY-MA
Career:	GRAD Graduate	Acad Plan Type:	MAJ Term Detail
FA Term Effdt:	11/30/2007 1	Sub-Plan:	Messages
Financial Aid Load:	Full-Time	Study Form:	ENRL

Budget Demographic Information

Dependency Status:	IND	Family Members:	01 Enrollment Detail
Housing Status:	Off Campus	State of Residence:	
Marital Status:	Single	App State Res:	ME
		Postal Code:	

Budget Group: GBATCH

Category	Item Code	Description	Amount	Rule	Item Stat
BOOK				Formula	Selected
MISC				Formula	Selected
ROOM				Formula	Selected
TRAV				Formula	Selected
TUIT				Formula	Selected

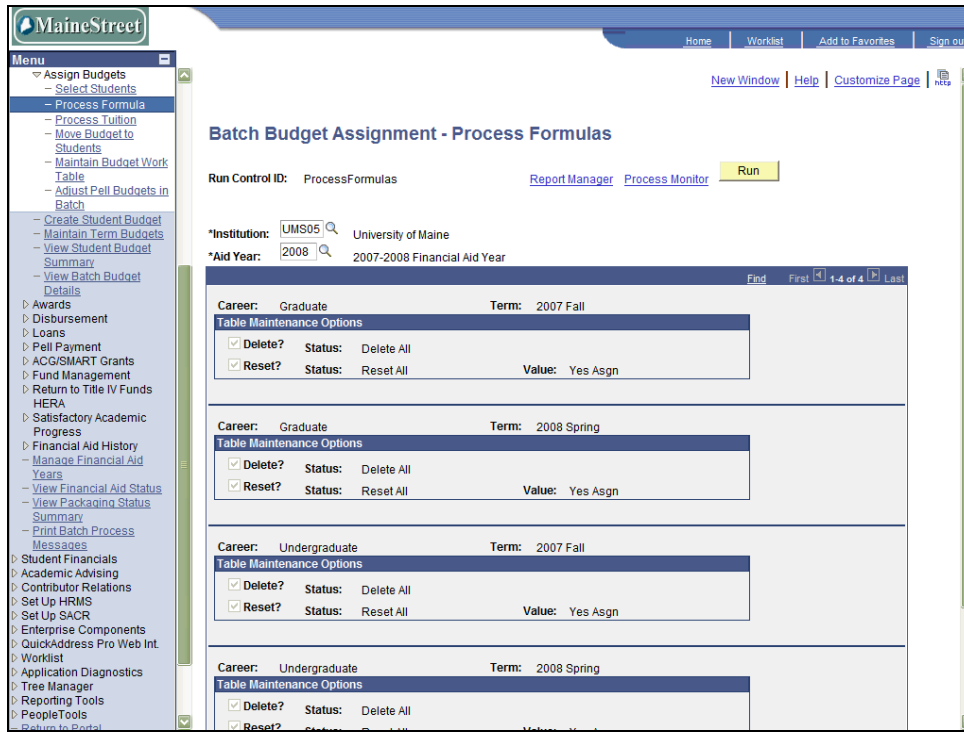
Step	Action
18.	Note the Item Stat column. This verifies that the student has been selected. Return to the batch process. Click Assign Budgets in the menu. Assign Budgets

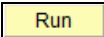


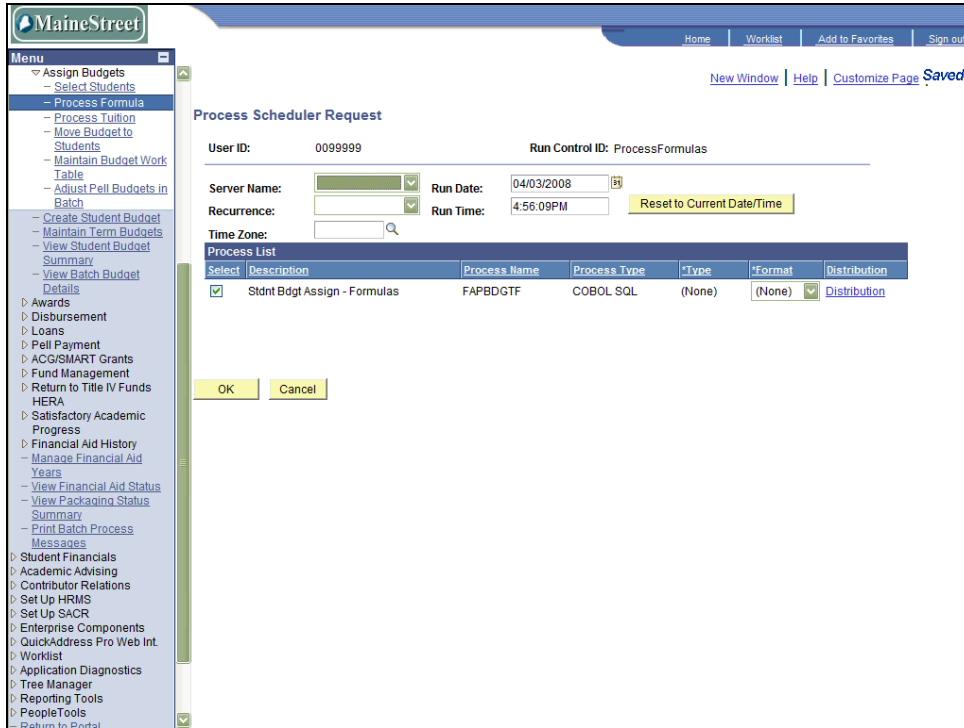
Step	Action
19.	Step 2: Process Formulas. Click Process Formulas in the menu or the page.
20.	As for Step 1, you need a Run Control ID for this step. Either select an existing Run Control ID or create a new one.
21.	This step assigns budget items and amounts for the budget categories assigned to students by the selection process. Make sure the correct Institution is entered. Select the correct Aid Year .

Process Document

Financial Aid: Batch Budget Create-040308



Step	Action
22.	Click Run . 



MaineStreet Home Worklist Add to Favorites Sign out

New Window | Help | Customize Page **Saved**

Process Scheduler Request

User ID: 0099999 Run Control ID: ProcessFormulas

Server Name: [Dropdown] Run Date: 04/03/2008 [BT]

Recurrence: [Dropdown] Run Time: 4:56:09PM [Reset to Current Date/Time](#)

Time Zone: [Dropdown]

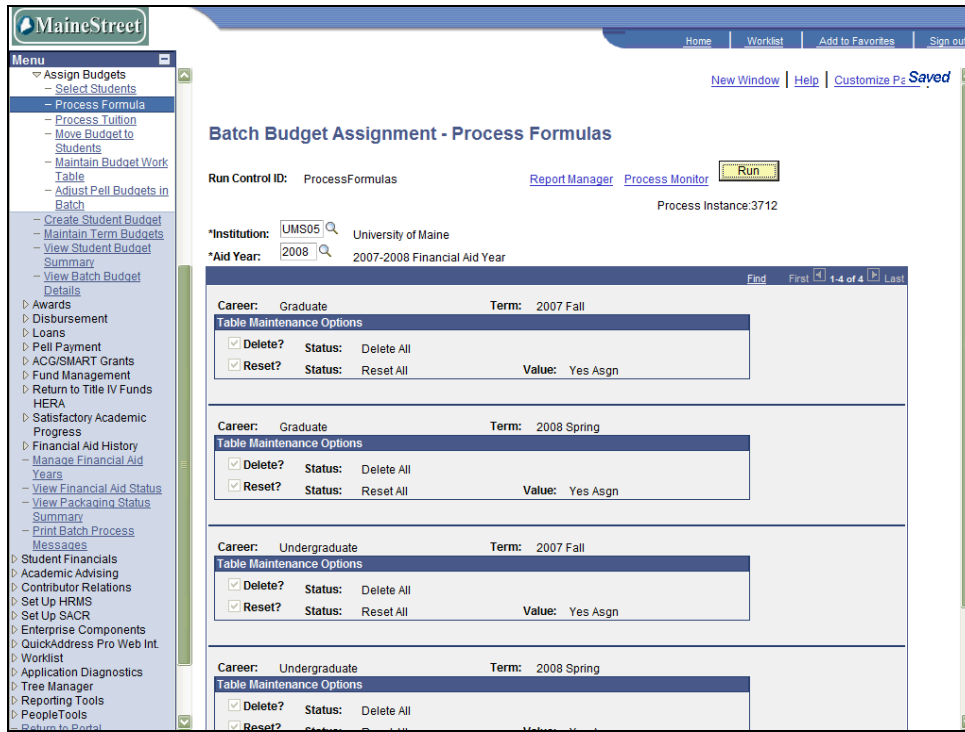
Select	Description	Process Name	Process Type	Format	Distribution
<input checked="" type="checkbox"/>	Stdnt Edgt Assign - Formulas	FAPBDGTF	COBOL SQL	(None)	Distribution

[OK](#) [Cancel](#)

Step	Action
23.	<p>Click OK.</p> <p>OK</p>

Process Document

Financial Aid: Batch Budget Create-040308



Batch Budget Assignment - Process Formulas

Run Control ID: ProcessFormulas [Report Manager](#) [Process Monitor](#)

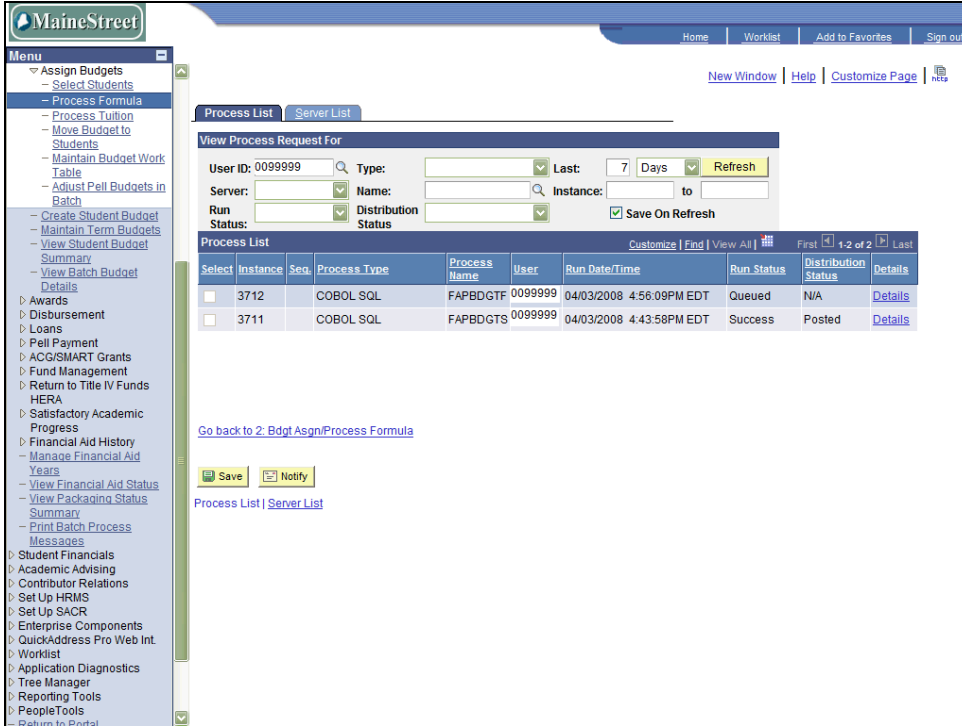
Process Instance: 3712

*Institution: UMS05 University of Maine

*Aid Year: 2008 2007-2008 Financial Aid Year

Career:	Term:
Graduate	2007 Fall
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn
Graduate	2008 Spring
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn
Undergraduate	2007 Fall
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn
Undergraduate	2008 Spring
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn


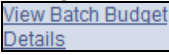
Step	Action
24.	Click the Process Monitor link. Process Monitor



The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' with various options like 'Assign Budgets', 'Process Formula', and 'View Batch Budget Details'. The main area is titled 'Process List' and 'Server List'. It features a 'View Process Request For' form with fields for 'User ID', 'Server', 'Name', 'Last' (7 Days), and 'Instance'. Below this is 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"/>	3712		COBOL SQL	FAPBDGTF	0099999	04/03/2008 4:56:09PM EDT	Queued	N/A	Details
<input type="checkbox"/>	3711		COBOL SQL	FAPBDGTS	0099999	04/03/2008 4:43:58PM EDT	Success	Posted	Details

Below the table are 'Save' and 'Notify' buttons, and a link to 'Go back to 2. Bdggt Asgn/Process Formula'. The bottom of the interface shows 'Process List | Server List'.

Step	Action
25.	As before, click Refresh until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> . 
26.	To verify that the formulas were processed, use the View Batch Budget Details component again. Navigate to View Batch Budget Details in the menu. 

Process Document

Financial Aid: Batch Budget Create-040308



MaineStreet

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#) | 

Menu

- ▷ Verification
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Batch Budget Review

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

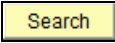

Find an Existing Value

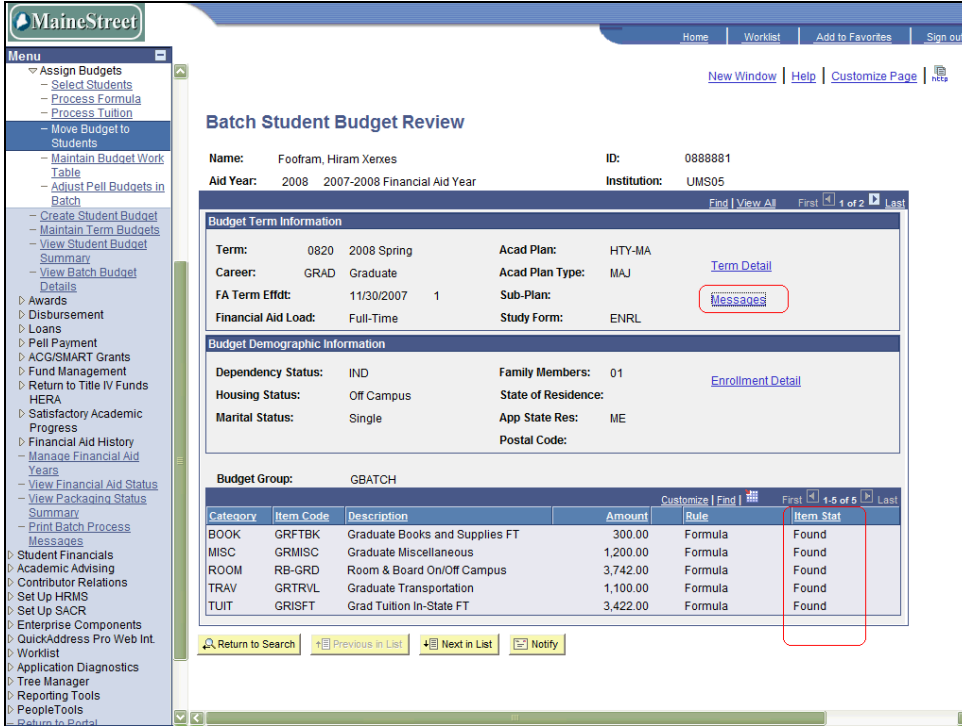
Academic Institution:

Aid Year:

ID:

[Basic Search](#)

Step	Action
27.	Enter the Institution and Aid Year . Click Search . 
28.	A list of the students is displayed. Select a student from the list. 
29.	Note the Item Stat now reads "Found." You can check Messages related to the process by clicking the Messages link. To return to the batch budget assign procedure, click Assign Budgets in the menu.



MaineStreet Home Worklist Add to Favorites Sign out

New Window Help Customize Page

Batch Student Budget Review

Name: Foofram, Hiram Xerxes ID: 0888881
 Aid Year: 2008 2007-2008 Financial Aid Year Institution: UMS05

Find | View All First 1 of 2 Last

Budget Term Information

Term:	0820 2008 Spring	Acad Plan:	HTY-MA	Term Detail
Career:	GRAD Graduate	Acad Plan Type:	MAJ	Messages
FA Term Effdt:	11/30/2007 1	Sub-Plan:		
Financial Aid Load:	Full-Time	Study Form:	ENRL	

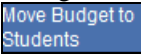
Budget Demographic Information

Dependency Status:	IND	Family Members:	01	Enrollment Detail
Housing Status:	Off Campus	State of Residence:		
Marital Status:	Single	App State Res:	ME	
		Postal Code:		

Budget Group: GBATCH

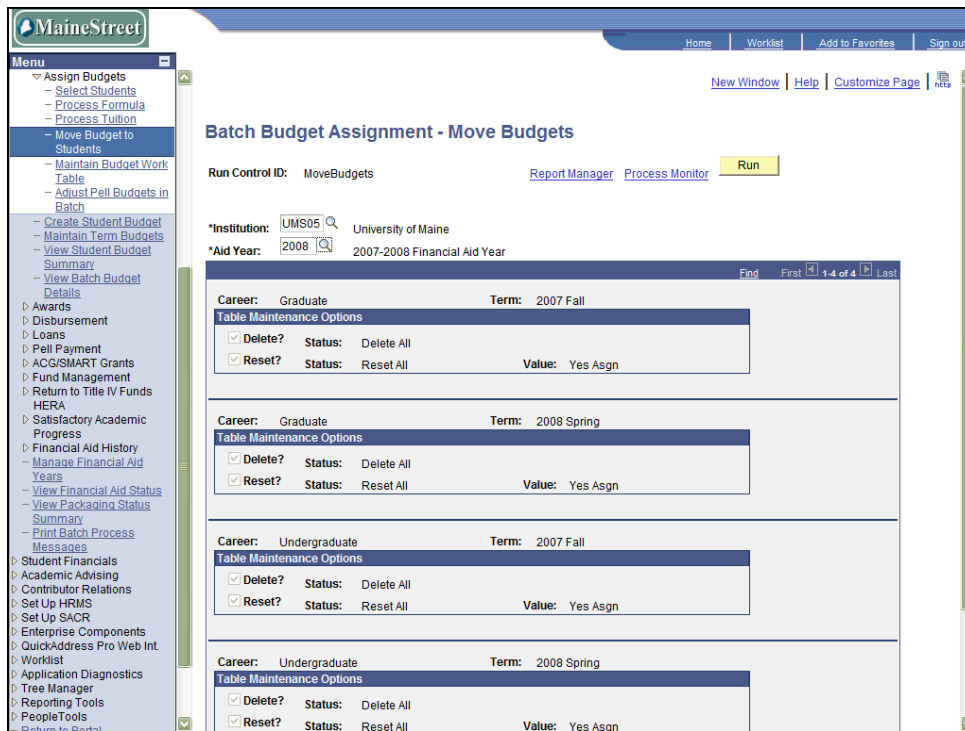
Category	Item Code	Description	Amount	Rule	Item Stat
BOOK	GFTBK	Graduate Books and Supplies FT	300.00	Formula	Found
MISC	GRMISC	Graduate Miscellaneous	1,200.00	Formula	Found
ROOM	RB-GRD	Room & Board On/Off Campus	3,742.00	Formula	Found
TRAV	GTRVRL	Graduate Transportation	1,100.00	Formula	Found
TUIT	GRISFT	Grad Tuition In-State FT	3,422.00	Formula	Found

Return to Search Previous in List Next in List Notify

Step	Action
30.	<p>Step 3: Move the Budgets.</p> <p>Navigate to Move Budget to Students in the menu.</p> 
31.	Find an existing Run Control ID or create a new one.

Process Document

Financial Aid: Batch Budget Create-040308



MaineStreet Home | Worklist | Add to Favorites | Sign out

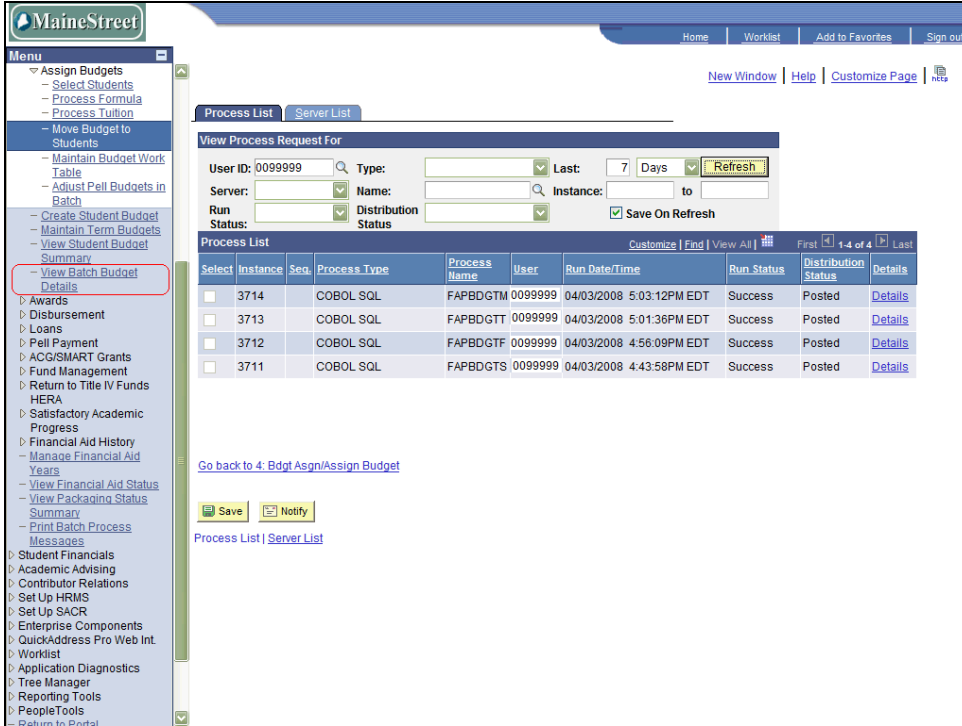
Batch Budget Assignment - Move Budgets [New Window](#) | [Help](#) | [Customize Page](#) | [Run](#)

Run Control ID: MoveBudgets [Report Manager](#) [Process Monitor](#) [Run](#)

*Institution: UMS05 University of Maine
 *Aid Year: 2008 2007-2008 Financial Aid Year

Career:	Term:
Graduate	2007 Fall
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn
Graduate	2008 Spring
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn
Undergraduate	2007 Fall
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn
Undergraduate	2008 Spring
Table Maintenance Options	
<input checked="" type="checkbox"/> Delete?	Status: Delete All
<input checked="" type="checkbox"/> Reset?	Status: Reset All Value: Yes Asgn

Step	Action
32.	<p>This step moves budget results to the student’s budget record with an effective-dated row.</p> <p>Enter the Institution and Aid Year if necessary.</p> <p>Click Run. As before, click OK on the next page, then click the Process Monitor link and Refresh until Run Status is Success and Distribution Status is Posted.</p> <p>Run</p>



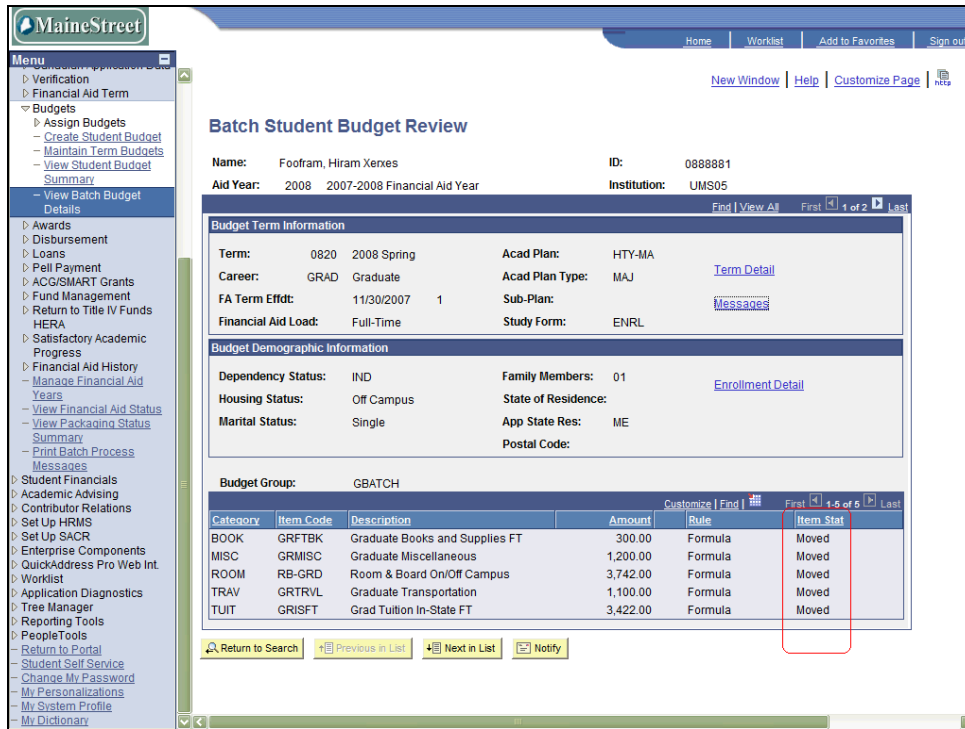
The screenshot shows the MaineStreet web application. On the left is a navigation menu with 'View Batch Budget Details' highlighted. The main content area displays a 'View Process Request For' form with fields for User ID, Server, Name, Instance, Run Status, and Distribution Status. Below the form is a 'Process List' table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3714		COBOL SQL	FAPBDGTM	0099999	04/03/2008 5:03:12PM EDT	Success	Posted	Details
<input type="checkbox"/>	3713		COBOL SQL	FAPBDGTT	0099999	04/03/2008 5:01:36PM EDT	Success	Posted	Details
<input type="checkbox"/>	3712		COBOL SQL	FAPBDGTF	0099999	04/03/2008 4:56:09PM EDT	Success	Posted	Details
<input type="checkbox"/>	3711		COBOL SQL	FAPBDGTS	0099999	04/03/2008 4:43:58PM EDT	Success	Posted	Details

Step	Action
33.	<p>As before, you can check the results by using the View Batch Budget Details component.</p> <p>Navigate to View Batch Budget Details in the menu.</p> <p>View Batch Budget Details</p>
34.	<p>Enter the Institution and Aid Year and click Search.</p> <p>Select a student in the Search Results list.</p>

Process Document

Financial Aid: Batch Budget Create-040308



MaineStreet

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page

Batch Student Budget Review

Name: Foofram, Hiram Xenex ID: 0888881
 Aid Year: 2008 2007-2008 Financial Aid Year Institution: UMS05

Budget Term Information

Term: 0820 2008 Spring Acad Plan: HTY-MA
 Career: GRAD Graduate Acad Plan Type: MAJ [Term Detail](#)
 FA Term Effdt: 11/30/2007 1 Sub-Plan: [Messages](#)
 Financial Aid Load: Full-Time Study Form: ENRL

Budget Demographic Information

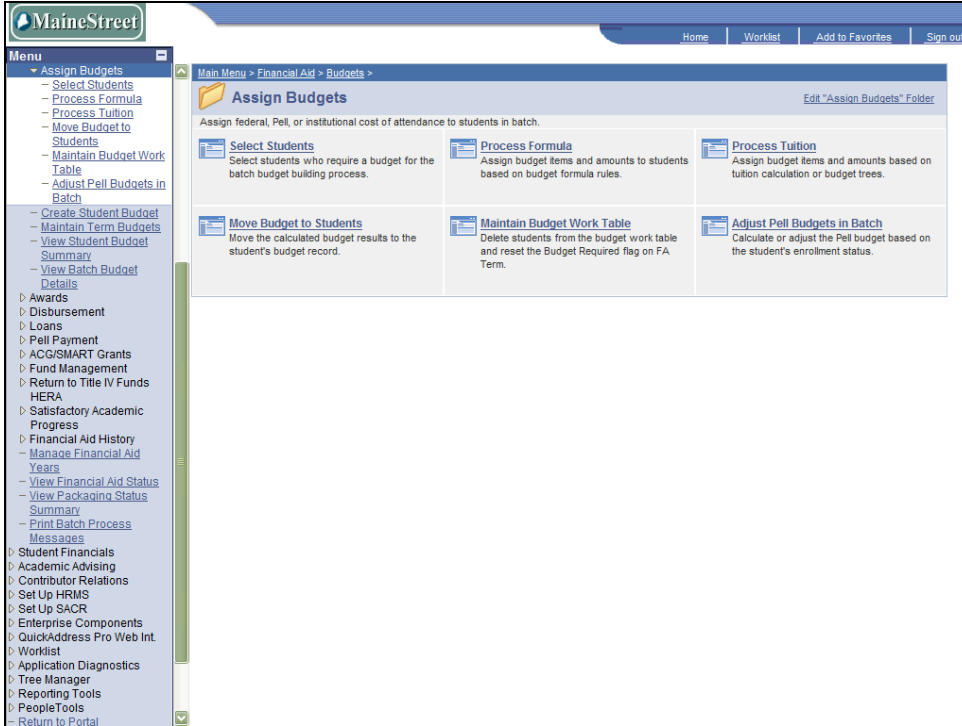
Dependency Status: IND Family Members: 01 [Enrollment Detail](#)
 Housing Status: Off Campus State of Residence:
 Marital Status: Single App State Res: ME
 Postal Code:

Budget Group: GBATCH

Category	Item Code	Description	Amount	Rule	Item Stat
BOOK	GRFTBK	Graduate Books and Supplies FT	300.00	Formula	Moved
MISC	GRMISC	Graduate Miscellaneous	1,200.00	Formula	Moved
ROOM	RB-GRD	Room & Board On/Off Campus	3,742.00	Formula	Moved
TRAV	GRTRVL	Graduate Transportation	1,100.00	Formula	Moved
TUIT	GRISFT	Grad Tuition In-State FT	3,422.00	Formula	Moved

Return to Search | Previous in List | Next in List | Notify

Step	Action
35.	Return to the Assign Budget procedure. Navigate to Assign Budgets in the menu.

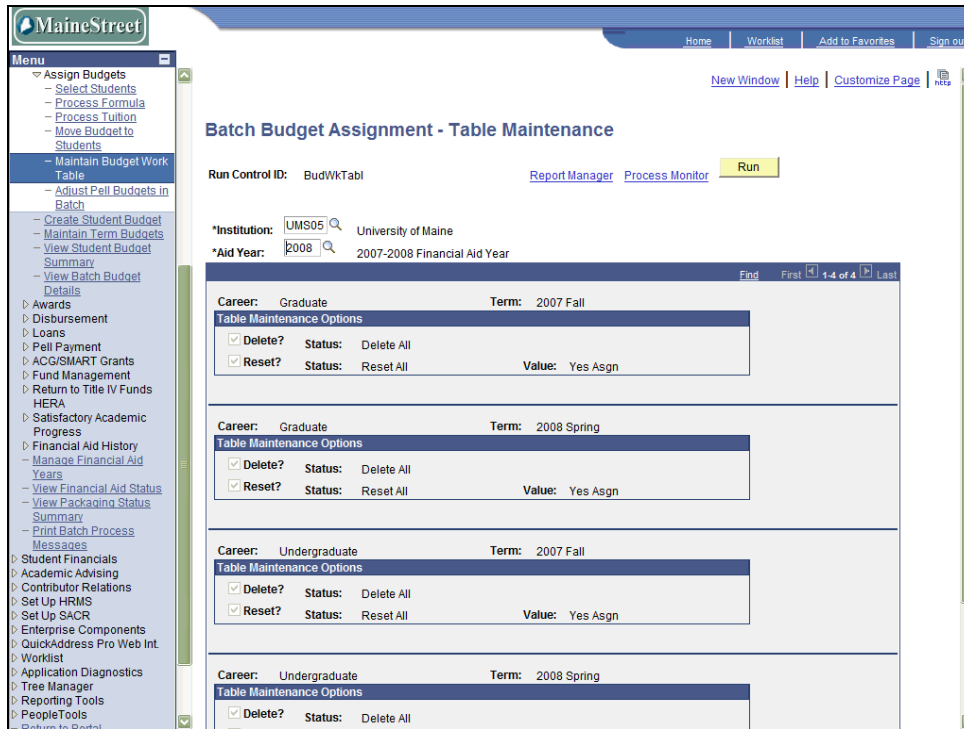


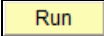
The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' sidebar with a tree view. The 'Assign Budgets' folder is expanded, showing sub-items: 'Select Students', 'Process Formula', 'Process Tuition', 'Move Budget to Students', 'Maintain Budget Work Table', and 'Adjust Pell Budgets in Batch'. The main content area displays the 'Assign Budgets' page with a description: 'Assign federal, Pell, or institutional cost of attendance to students in batch.' Below this are six action cards: 'Select Students' (Select students who require a budget for the batch budget building process.), 'Process Formula' (Assign budget items and amounts to students based on budget formula rules.), 'Process Tuition' (Assign budget items and amounts based on tuition calculation or budget trees.), 'Move Budget to Students' (Move the calculated budget results to the student's budget record.), 'Maintain Budget Work Table' (Delete students from the budget work table and reset the Budget Required flag on FA Term.), and 'Adjust Pell Budgets in Batch' (Calculate or adjust the Pell budget based on the student's enrollment status.).

Step	Action
36.	<p>Step 4: Maintain the Work Table.</p> <p>Navigate to Maintain Budget Work Table in the menu.</p>
37.	<p>Use an existing Run Control ID or create a new one for this process.</p>

Process Document

Financial Aid: Batch Budget Create-040308



Step	Action
38.	<p>This step deletes students from the budget work table and resets the Budget Required flag on the Financial Aid Info page in the Financial Aid Term component.</p> <p>Enter the Institution and Aid Year. Click Run.</p> <p>On the next page, click OK, then the Process Monitor link, and Refresh until Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i>.</p> <p></p>
39.	This completes the Assign Budgets procedure.
40.	End of Procedure.