

Batch Budget Create-040308

1.	<p>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.</p>
2.	<p>Enter your Institution and the Aid Year. Click Search.</p> <p>If you see the message "<i>No matching values were found</i>" then you know that the prior batch budget run completed all 4 steps and you can proceed to process new budgets.</p> <p>Otherwise, check the Item Status for a student to see which steps need to be completed in the prior run.</p>
3.	<p>Step 1: Select the Students Navigate: Financial Aid > Budgets > Assign Budgets > Select Students.</p>
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>
5.	<p>Make sure that the correct Institution is entered. Select the Aid Year by clicking on the Aid Year look up button.</p>
6.	<p>Select the Aid Year from the list.</p>
7.	<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>
8.	<p>Click OK.</p>
9.	<p>Click the Process Monitor link.</p>
10.	<p>Click Refresh from time to time until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i>.</p>
11.	<p>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.</p>
12.	<p>To view details of the student selection, use the View Batch Budget Details component. Navigate to View Batch Budget Details.</p>
13.	<p>Enter the correct Institution and Aid Year and click Search to bring up a list of the selected students.</p>
14.	<p>Select a student from the Search Results list.</p>
15.	<p>Note the Item Stat column. This verifies that the student has been selected. Return to the batch process. Click Assign Budgets in the menu.</p>
16.	<p>Step 2: Process Formulas. Click Process Formulas in the menu or the page.</p>
17.	<p>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.</p>

Quick Guide



18.	Make sure the correct Institution is entered. Select the correct Aid Year .
19.	Click Run .
20.	Click OK .
21.	Click the Process Monitor link.
22.	As before, click Refresh until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> .
23.	To verify that the formulas were processed, use the View Batch Budget Details component again. Navigate to View Batch Budget Details in the menu.
24.	Enter the Institution and Aid Year. Click Search.
25.	A list of the students is displayed. Select a student from the list.
26.	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.
27.	Step 3: Move the Budgets. Navigate to Move Budget to Students in the menu.
28.	Find an existing Run Control ID or create a new one.
29.	This step moves budget results to the student's budget record with an effective-dated row. Enter the Institution and Aid Year if necessary. Click Run . As before, click OK on the next page, then click the Process Monitor link and Refresh until Run Status is <i>Success</i> and Distribution Status is <i>Posted</i> .
30.	As before, you can check the results by using the View Batch Budget Details component. Navigate to View Batch Budget Details in the menu.
31.	Enter the Institution and Aid Year and click Search . Select a student in the Search Results list.
32.	Return to the Assign Budget procedure. Navigate to Assign Budgets in the menu.
33.	Step 4: Maintain the Work Table. Navigate to Maintain Budget Work Table in the menu.
34.	Use an existing Run Control ID or create a new one for this process.
35.	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. Enter the Institution and Aid Year . Click Run . 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> .
36.	This completes the Assign Budgets procedure.
37.	End of Procedure.