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Budget Flag Assign

Concept

As delivered, the Budget Assign flag on FA Term is set to assign budget (*Yes Assign*) whenever FA Term is built for a student and captures some change. This will occur until the FA Census Date, unless some action is taken that locks budgets.

The Assign Budget Flag process can be used to set the Budget Assign flag to *Yes Assign* or *No Assign*.

Scenario: You have manually adjusted a student's budget. You click the Budget Lock checkbox on the student's Maintain Term Budgets page. Later you rebuild FA Term. Before you build budgets again, you want to run the Assign Budget Flag process to make sure the student's budget will not be rebuilt.

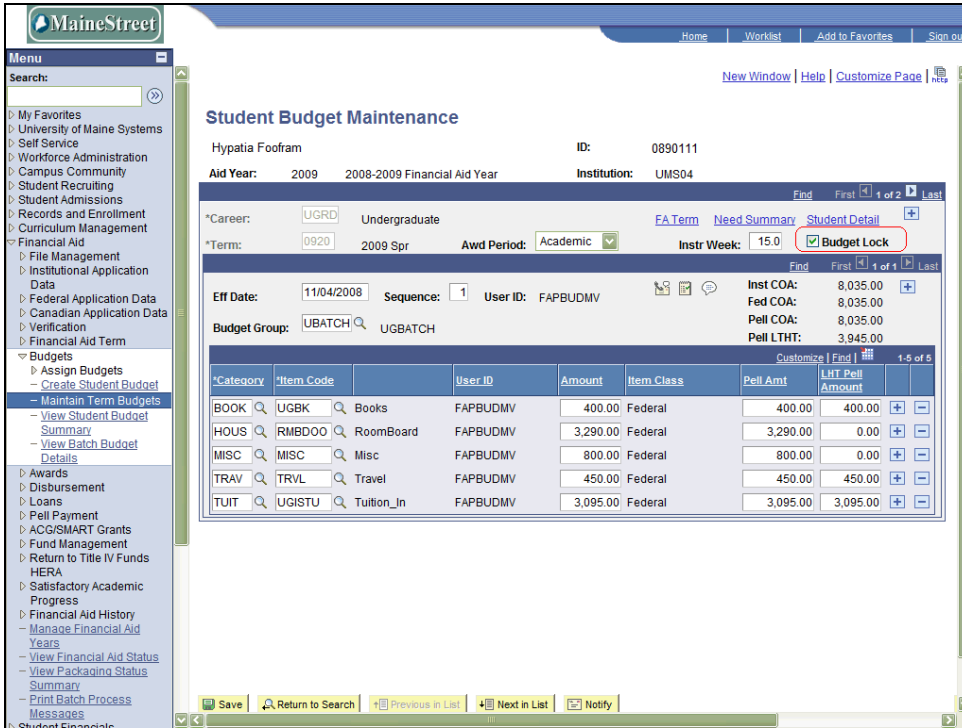
This may be done for all students or only those where the Budget Lock checkbox is selected on the Maintain Term Budgets page. There is also a way to specifically exclude students with the Budget Lock option on.

This process should be run after FA Term. It will only consider students who already have a budget. Students being processed through FA Term and budgets for the first time will not be impacted.

Procedure

The screenshot shows the 'Financial Aid Info' tab for student Hypatia Foofram (ID: 0890111) in the 2009 Spring semester. The 'Budget Required' field is highlighted with a red box and is currently set to 'No Assign'. Other fields include 'Effective Date' (10/09/2008), 'Academic Career' (Undergraduate), 'Academic Plan' (Marine Biology), and 'Primary Program' (Environ & Biological Sciences). The 'Overd' section contains checkboxes for 'NSLDS Loan Year', 'Direct Lending Year', 'Expected Grad Term', 'Expected Grad Date', 'Academic Standing', and 'FA Standing', each with a search icon.

Step	Action
1.	<p>View the Budget Assign Flag on the Financial Aid Info tab of a student's FA Term. Navigate: Financial Aid > Financial Aid Term > Maintain Student FA Term, and select the Financial Aid Info tab as shown in this example.</p> <p>The Budget Required field can be set to "No Assign", "Assgn Bdgt", "Error" and "In Prgres." "No Assign" means that the student's budget will not be recalculated the next time the batch budget process is run. "Assgn Bdgt" means that the student's budget WILL be recalculated.</p> <p>Use the Assign Budget Flag process to set the Budget Required field for a set of students in order to force or prevent recalculation of their budgets.</p>



Student Budget Maintenance

Hypatia Foofram ID: 0890111

Aid Year: 2009 2008-2009 Financial Aid Year Institution: UMS04

*Career: UGRD Undergraduate FA Term Need Summary **Student Detail**

*Term: 0920 2009 Spr Awd Period: Academic Instr Week: 15.0 **Budget Lock**

Eff Date: 11/04/2008 Sequence: 1 User ID: FAPBUDMV Inst COA: 8,035.00
 Fed COA: 8,035.00
 Pell COA: 8,035.00
 Pell LTHT: 3,945.00

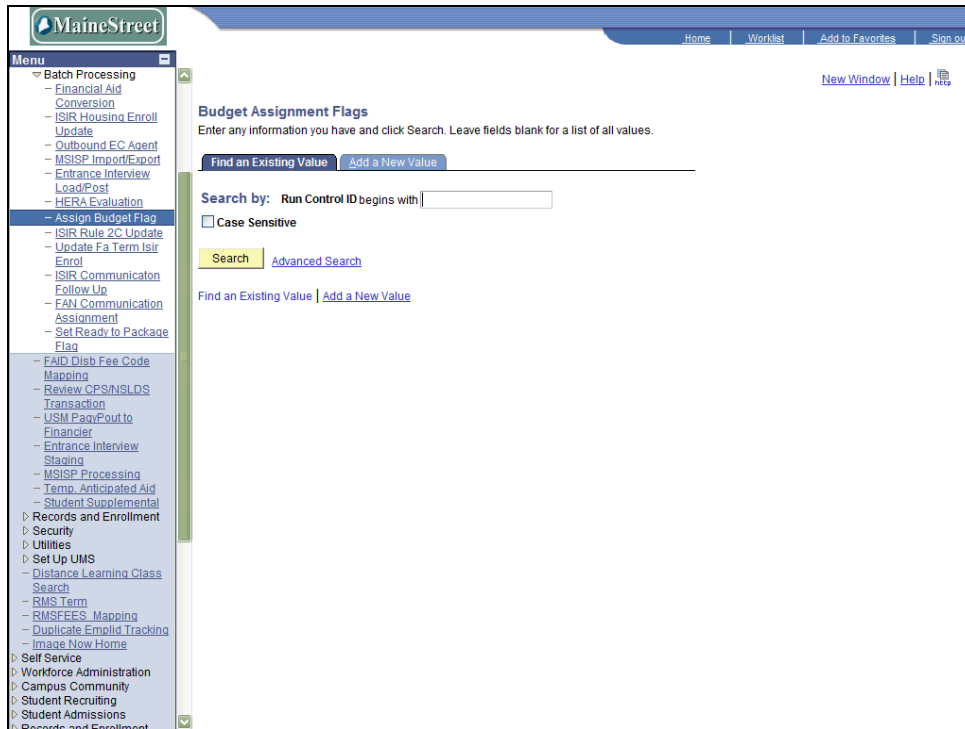
Budget Group: UBATCH UGBATCH

*Category	*Item Code		User ID	Amount	Item Class	Pell Amt	LHT Pell Amount	
BOOK	UGBK	Books	FAPBUDMV	400.00	Federal	400.00	400.00	+ -
HOUS	RMBDOO	RoomBoard	FAPBUDMV	3,290.00	Federal	3,290.00	0.00	+ -
MISC	MISC	Misc	FAPBUDMV	800.00	Federal	800.00	0.00	+ -
TRAV	TRVL	Travel	FAPBUDMV	450.00	Federal	450.00	450.00	+ -
TUIT	UGISTU	Tuition_In	FAPBUDMV	3,095.00	Federal	3,095.00	3,095.00	+ -

Step	Action
2.	To see where the Budget Lock check box can be set for an individual student, navigate to: Financial Aid > Budgets > Maintain Term Budgets and pull up a student. Refer to the example above.
3.	To run the Assign Budget Flag process, navigate: University of Maine Systems > Financial Aid > Batch Processing > Assign Budget Flag.

Process Document

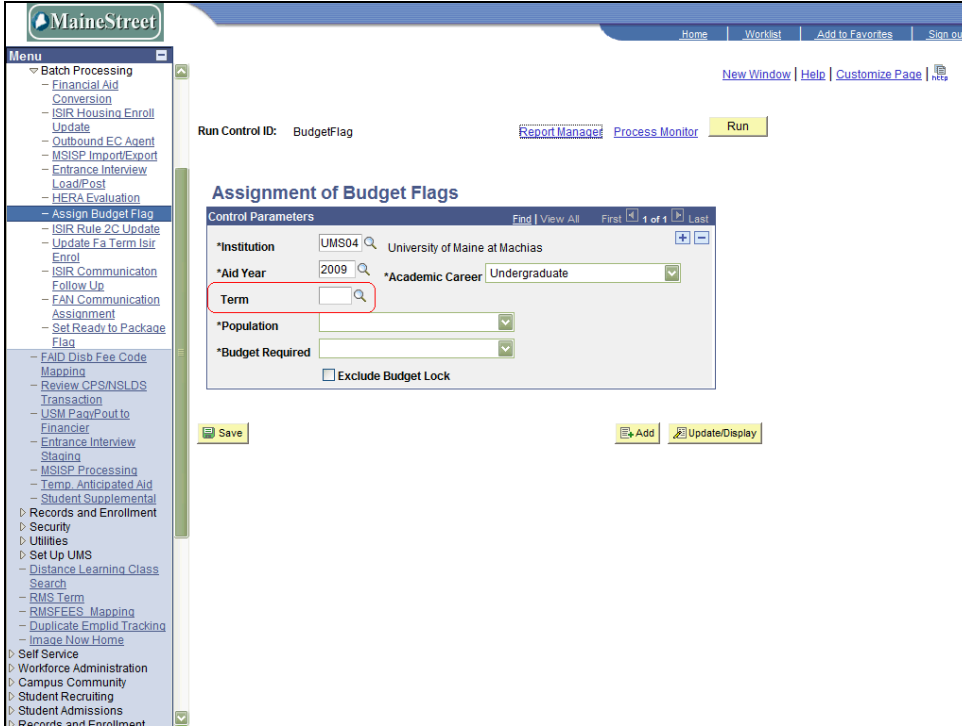
Financial Aid: Budget Flag Assign-092508



The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' sidebar with various options, including 'Assign Budget Flag' which is currently selected. The main content area is titled 'Budget Assignment Flags' and contains the following elements:

- Navigation links: Home, Worklist, Add to Favorites, Sign out
- Help links: New Window, Help
- Buttons: Find an Existing Value, Add a New Value
- Search field: Search by: Run Control ID begins with [input field]
- Checkbox: Case Sensitive
- Buttons: Search, Advanced Search
- Additional links: Find an Existing Value, Add a New Value



Step	Action
4.	The process requires a Run Control ID. Either select an existing Run Control ID or create a new one by clicking the Add a New Value tab, entering a name for the new ID and clicking the Add button.



The screenshot shows the 'MaineStreet' web application interface. On the left is a navigation menu with categories like 'Batch Processing', 'Records and Enrollment', and 'Self Service'. The main content area is titled 'Assignment of Budget Flags' and contains a 'Control Parameters' form. The form fields are:

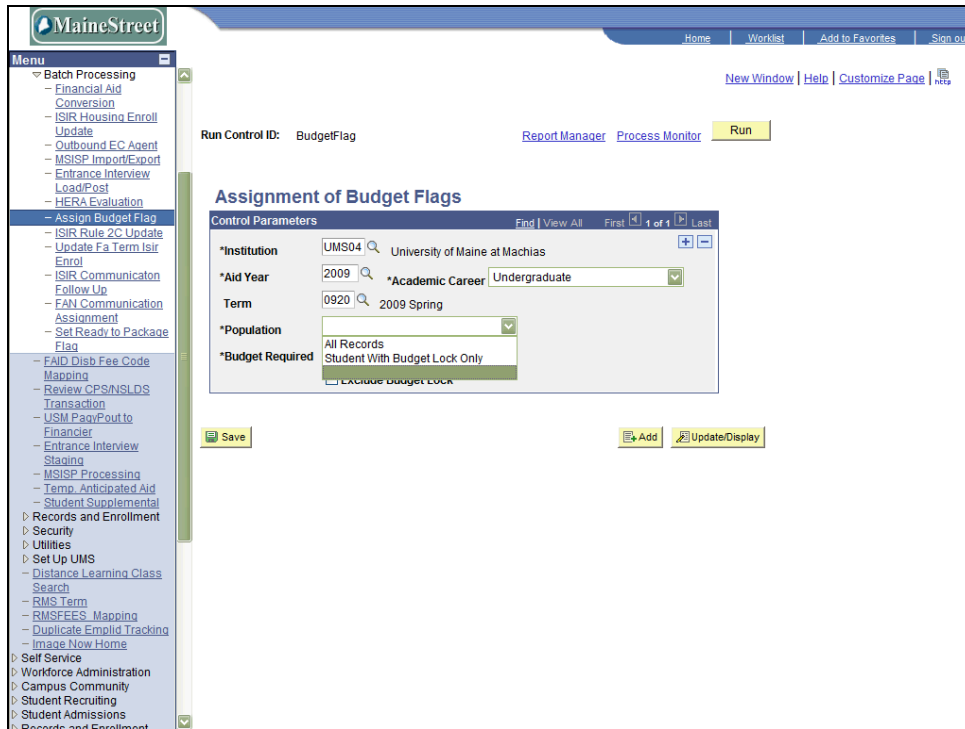
- *Institution: UMS04 (University of Maine at Machias)
- *Aid Year: 2009
- *Academic Career: Undergraduate
- Term: (Empty field with a search icon)
- *Population: (Dropdown menu)
- *Budget Required: (Dropdown menu)
- Exclude Budget Lock

 Below the form are buttons for 'Save', 'Add', and 'Update/Display'. At the top right of the form area, there are links for 'Report Manager', 'Process Monitor', and a 'Run' button. The 'Run Control ID' is 'BudgetFlag'.

Step	Action
5.	<p>Enter parameters for the process. Make sure the correct Institution, Aid Year and Academic Career are entered.</p> <p>You can run the process for an entire aid year or for a specified term in the aid year. To select a term, click the Look up Term button.</p> 
6.	<p>Select the desired term.</p> 
7.	<p>Select the set of students to process. Click the Population list.</p>

Process Document

Financial Aid: Budget Flag Assign-092508

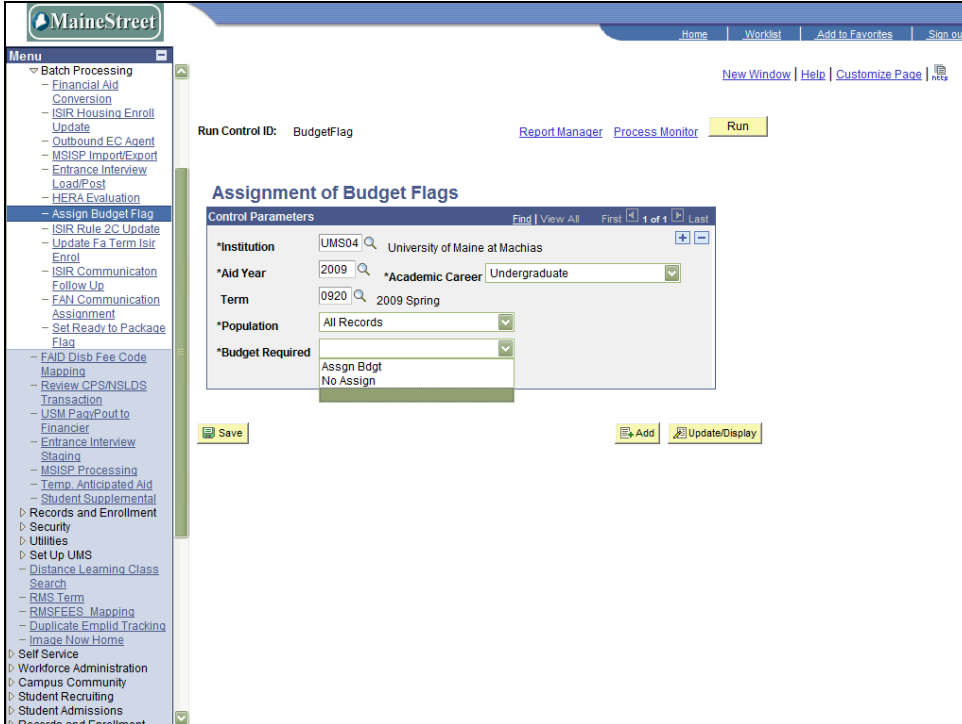



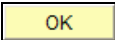
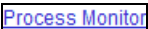
The screenshot shows the 'MaineStreet' web application interface. On the left is a 'Menu' tree with categories like 'Batch Processing', 'Assign Budget Flag', and 'FAID Disb Fee Code'. The main content area is titled 'Assignment of Budget Flags' and contains a 'Control Parameters' form. The form fields are as follows:

- *Institution:** UMS04 University of Maine at Machias
- *Aid Year:** 2009
- *Academic Career:** Undergraduate
- Term:** 0920 2009 Spring
- *Population:** All Records
- *Budget Required:** Student With Budget Lock Only

Buttons for 'Save', 'Add', and 'UpdateDisplay' are visible at the bottom of the form. A 'Run' button is also present at the top right of the page.

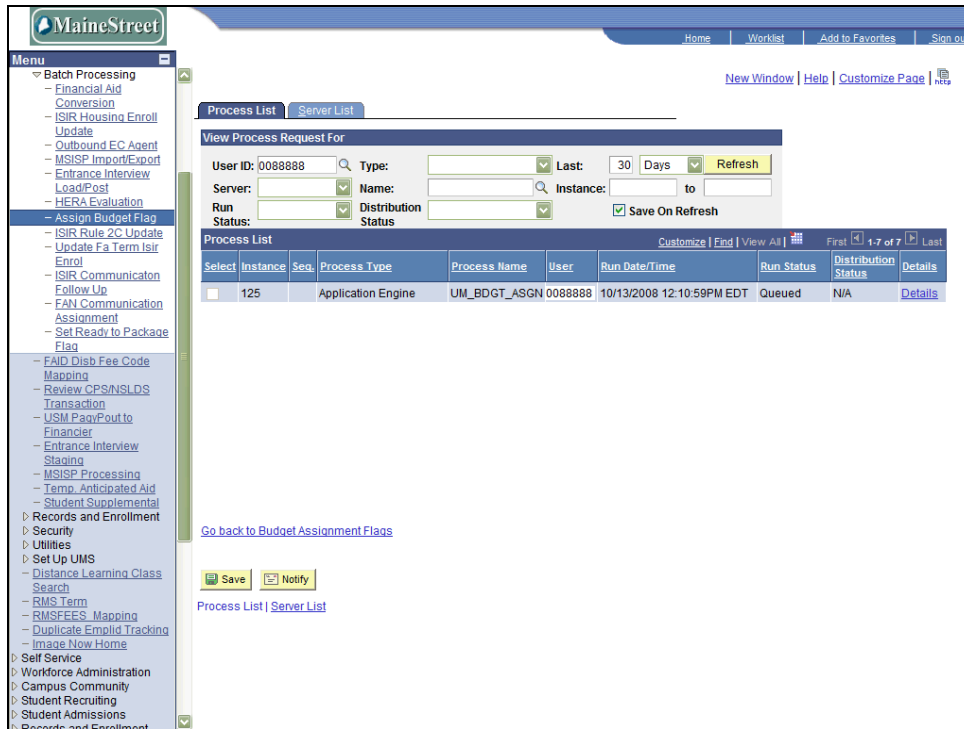
Step	Action
8.	Choose either all students (All Records), or only those students with the Budget Lock field selected on their budget page (Student With Budget Lock Only).





Step	Action
9.	Pull down the Budget Required list. You can choose to set the Budget Required flags for these students to Assign Bdgt or to No Assign.
10.	You can select the Exclude Budget Lock checkbox to exclude students whose budgets have the Budget Lock option selected. Clearly, if you selected the "Student With Budget Lock Only" choice for Population, you would NOT check the Exclude Budget Lock option.
11.	Run the process. Click the Run button. 
12.	Click the OK button. 
13.	Click the Process Monitor link. 

Process Document

Financial Aid: Budget Flag Assign-092508



The screenshot displays the MaineStreet web application. On the left is a navigation menu with categories like 'Batch Processing', 'Financial Aid', and 'Records and Enrollment'. The main content area shows the 'Assign Budget Flag' process. At the top, there's a 'View Process Request For' form with fields for User ID (0088888), Server, Name, and Instance, along with a 'Refresh' button. Below this is a 'Process List' 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 125, Process Type 'Application Engine', Process Name 'UM_BDGT_ASGN', User '0088888', Run Date/Time '10/13/2008 12:10:59PM EDT', and Run Status 'Queued'. There are also 'Save' and 'Notify' buttons at the bottom of the table area.

Step	Action
14.	Click Refresh from time to time until the Run Status is <i>Success</i> and the Distribution Status is <i>Posted</i> . Click the Refresh button. 
15.	Click the Details link. 

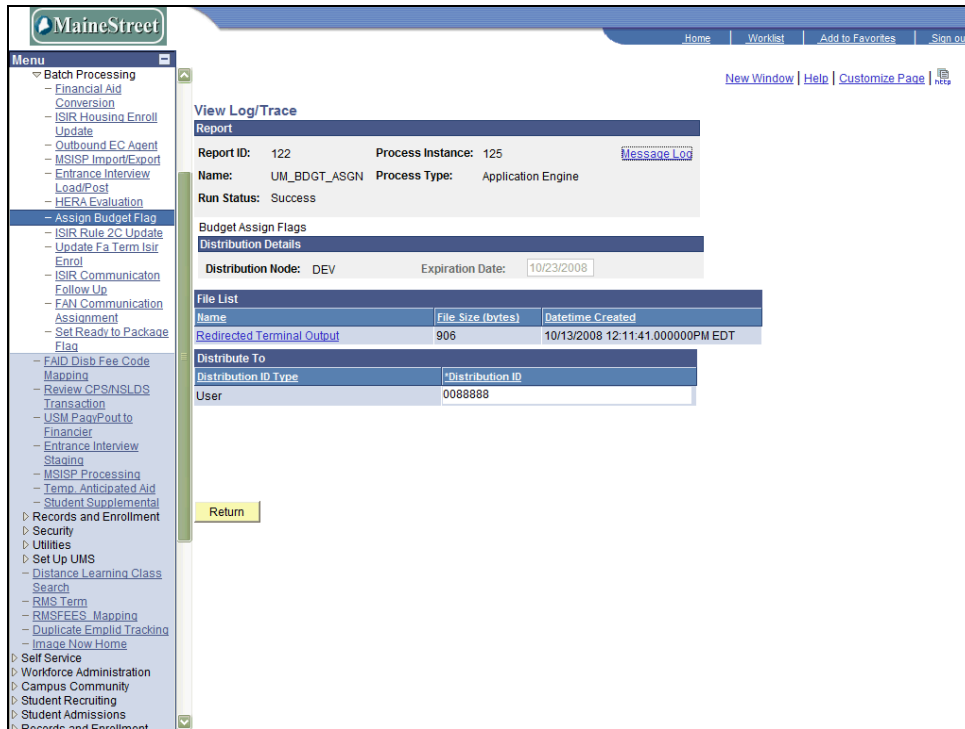


The screenshot shows the 'MaineStreet' application interface. On the left is a 'Menu' with various options, including 'Assign Budget Flag'. The main area displays 'Process Detail' for 'UM_BDGT_ASGN'. The process is an 'Application Engine' with 'Instance: 125' and 'Type: Application Engine'. The 'Run Status' is 'Success' and 'Distribution Status' is 'Posted'. Below this, there are sections for 'Run' (Run Control ID: BudgetFlag, Location: Server, Server: PSUNX, Recurrence:), 'Update Process' (with radio buttons for Hold, Queue, Cancel, Delete, and Restart Request), and 'Date/Time' (Request Created On: 10/13/2008 12:11:06PM EDT, Run Anytime After: 10/13/2008 12:10:59PM EDT, Began Process At: 10/13/2008 12:11:26PM EDT, Ended Process At: 10/13/2008 12:11:41PM EDT). An 'Actions' section contains links for Parameters, Transfer, Message Log, View Locks, Batch Timings, and View Log/Trace. At the bottom of the process detail area are 'OK' and 'Cancel' buttons.

Step	Action
16.	Click the View Log/Trace link. View Log/Trace

Process Document

Financial Aid: Budget Flag Assign-092508



Step	Action
17.	Click Redirected Terminal Output to view messages. Redirected Terminal Output
18.	The report lists the students whose flags were set.
19.	End of Procedure.