

Assigning Budgets in Batch

Purpose: Set up for Assign budgets in batch in ctcLink.

Audience: Financial Aid staff.

This QRG combines two processes for assigning budgets in batch:

1. [Creating Budget JobSet](#) - Processing the rules and equations built to construct student budgets.
2. [Schedule Budget JobSet](#) - Run the Event Replay Schedule load job to set the process recurrence.

❗ You must have at least one of these local college managed security roles:

- ZZ FA Pop Update

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Set Budget Required Flag to "Y" - Assign Budget

❗ Use with Enrollment-Based Budgeting only

Navigation: Set Up SACR > System Administration > Utilities > Population Update > Population Update Process

1. On the **Population Update Process** search page, enter a **New** or use an existing value **Run Control ID**.
2. Select **Add** button if new; otherwise, select the **Search** button. The **Population Selection Update** will display.
3. On the **Population Selection Update** page, choose **STDNT_FA_TERM Student FA Term** from the **Record (Table) Name** drop-down menu.
4. Select the **Report Error Messages**.
5. Choose **PS Query** from the **Selection Tool** drop-down menu.
6. **Query Name** field = **CTC_FA_SETBUDFLAG_Y**
7. Select the **Edit Prompts** link. The **Query Prompts** window will display.
8. On the **Query Prompts** pagelet, enter **Institution**.

9. Enter **Aid Year**.
10. Select the **OK** button. The **Population Selection Update** page will display.
11. On the **Population Selection Update** page, complete the following fields:
12. In the **Select Fields to Update** section, **Field Name** drop-down menu choice = **Budget Required**.
13. In the **Select Fields to Update** section, **Field Value** drop-down menu choice = **Yes - Budget Assign Required**.
14. Select the **Save** button - DO NOT SELECT RUN.
15. The process to set budget update flags is complete.
16. Continue on to **Creating the Budget Jobset** so that your budgets will run nightly.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to [Assign Budgets in Batch - Set Budget Flag to Y - Assign Budget](#). This link will open in a new tab/window.

Set Budget Flag to "Y" - Assign Budget for All Terms

 Use with Enrollment-Based Budgeting only

Navigation: Set Up SACR > System Administration > Utilities > Population Update > Population Update Process

1. On the **Population Update Process** search page, enter a **New** or use an existing value **Run Control ID**.
2. Select **Add** button if new; otherwise, select the **Search** button. The **Population Selection Update** will display.
3. On the **Population Selection Update** page, choose **STDNT_FA_TERM Student FA Term** from the **Record (Table) Name** drop-down menu.
4. Select the **Report Error Messages**.
5. Choose **PS Query** from the **Selection Tool** drop-down menu.

6. **Query Name** field = **CTC_FA_BUDFLAG_ALLTERMS**
7. Select the **Edit Prompts** link. The **Query Prompts** window will display.
8. On the **Query Prompts** pagelet, enter **Institution**.
9. Enter **Aid Year**.
10. Select the **OK** button. The **Population Selection Update** page will display.
11. On the **Population Selection Update** page, complete the following fields:
12. In the **Select Fields to Update** section, **Field Name** drop-down menu choice = **Budget Required**.
13. In the **Select Fields to Update** section, **Field Value** drop-down menu choice = **Yes - Budget Assign Required**.
14. Select the **Save** button - DO NOT SELECT RUN.
15. The process to set budget update flags is complete.
16. Continue on to **Creating the Budget Jobset** so that your budgets will run nightly.

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Create Budget JobSet

 You must have at least one of these local college managed security roles:

- ZC FA Local Configuration
- ZD FA Local Configuration

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: Set up SACR > Common Definitions > Equation Engine > Run Equation

1. The Run Equation search page displays.
2. Enter a **New** or use existing **Run Control ID**.
3. Select **Add** button for new value, or **Search** button if using existing ID.
4. From the Run An Equation page, complete the following fields.
5. **Equation** = CTCFABUDYEAR (Assign Budget Process Aid Year).
6. **Global** = AID_YEAR.
7. **Type** = String (*Note - The Operand field will not appear until the Type field is populated).
8. **Operand** = current aid year (example 2018).
9. Insert a **new row** by selecting **(+) icon**.
10. Enter the following data:
11. **Global** = INSTITUTION.
12. **Type** = String.
13. **Operand** = Institution ID.
14. Select the **Save** button. DO NOT SELECT RUN.
15. The process to create the Budget JobSet is complete.

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Schedule Budget JobSet

 You must have at least one of these local college managed security roles:

- ZZ Process Scheduler

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Navigation: PeopleTools > Process Scheduler > Schedule JobSet Definitions

1. The Schedule JobSet Definitions search page displays. On this page, enter the following information:
 - a. Select the **Add a New Value** tab.
 - b. Enter the new **Schedule Name** - select a 'unique to your institution' Schedule Name, i.e. WAXXX_CTCFABUD_KF (WAXXX = Your institution code, i.e., WA280), and your initials at the end of the Schedule Name. If your Schedule Name is not unique, you may run the risk of running the same process name as someone else in the CTC System.
 - c. Enter the Job Name **CTCFABUD**.
2. Select the **Add** button. The Schedule JobSet Definition tab will display.
3. The Schedule JobSet Definition tab displays.
4. Enter a **Description** = Should auto-populate with Schedule Name created in previous step.
5. Enter a **Run Control ID**.
6. **Status** = *Inactive* if running now, *Active* if scheduling.
7. **Priority** = Medium.
8. Verify **Begin Date, Time** and **Time Zone** reflects the current date and time.
9. Verify your college's State Board assigned **Recurrence Name** for your institution and enter it., e.g., **M - F @ 1:00 AM**
10. **Server Run Option** = Any Server.
11. **Primary Server** = PSUNX.
12. **Operating System** = UNIX.
13. Select the **Schedule JobSet Items** tab.
14. From the **Schedule JobSet** Items tab, select the **CTCFABUD** link. The **Process List** page will display.
15. When the **Process List** opens, complete the following **Process Name** fields for their **Run Control IDs**:
 16. **SCC_POP_UPD** = Run Controls from the Set Budget flag-ALL TERMS process.
 17. **FAPPREQRN – FAPBDGTD** = Run Control for Equation Engine (see *Create Budget JobSet* steps above).
16. Select the **Schedule JobSet Definition** tab again.
17. Select the **Save** button.
18. Two process to assign budgets in batch is now complete.
19. End of procedure.

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