

SCREEN 050 – Active Budget Maintenance

This screen is used to gain initial access to the Active Budget database on-line maintenance system. All of the various functions of the system are accessed from this screen.

Once on Screen 050, any one of the various functions may now be selected.

| Function | General Description |
|----------|---|
| Blank | INQUIRY - The user may view any or all data on the Active Budget database for the specified PIN, iteration and fiscal year. In INQUIRY mode, the user is free to move from one PIN to another, change ITERATIONS within the same PIN or even change the fiscal year without returning to the function select screen. This allows a great deal of freedom in viewing records for a particular position or person. |
| C | CORRECTION - This function is used to correct data that is already on the Active Budget database. The user is presented with the data on the Active Budget database and is given the opportunity to change the data or add new data items. All data fields are edited prior to allowing the user to proceed to the next requested screen. |
| I | NEW ITERATION - This function is used to create a new iteration for a PIN which is already on the Active Budget database. The user is presented with the data from the last non-withdrawn iteration of the selected PIN and is given the opportunity to input changes to the budget. These changes will be reflected in the next iteration being added to the database. All data fields are edited prior to allowing the user to proceed to the next requested screen. |
| N | NEW PIN - This function is used to create a new position on the Active Budget database. The user is presented with empty screens upon which the data for the new PIN should be entered. All data fields on the screens are edited prior to allowing the user to pass to the next requested screen. |
| R | REACTIVATE PIN - This function is used to reactivate a PIN that is no longer on the Active Budget database. The user is presented with empty screens upon which the data for the new PIN should be entered. All data fields on the screen are edited prior to allowing the user to pass to the next requested screen. |
| S | SCHEDULE FORM 500 - This function causes a printed copy of the data relevant to the specified PIN and iteration (FORM 500) to be produced via batch (off-line) processing at a later time. If the requested iteration has a status of C (Cleared), a FORM 500 T will be produced. Otherwise, a FORM 500 R will be generated. |
| W | WITHDRAW FORM 500 FROM SCHEDULING (Printing) - This function prevents the production of a FORM 500 for the specified PIN and iteration which had previously been scheduled. |

To return to the Function Select Screen from any screen in the Active Budget System, either press the **PF3** key, or enter **050** or **E** in the next screen code field.

050 TAMUS B/P/P System - Active Budget Maintenance

01/11/12 14:23
P BPP0002 R202

Screen: A1

Function: B1 Blank = Inquiry
 C = Correction
 I = New Iteration
 N = New PIN
 R = Reactivate PIN
 S = Schedule form 500
 W = Withdraw form 500 from scheduling

PIN: C1
Iteration: D1
Screen: E1 PO = Position/Occupant/Salary
 AS = Source
 AC = Comment

Year: F1

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
 Help Exit Main

| Field Name | | Description |
|------------|-----------|--|
| A1 | Screen | See System Overview |
| B1 | Function | Valid codes listed above |
| C1 | PIN | Position Identification Number – Valid workstation immediately followed by: <ul style="list-style-type: none"> • an SSN for Wage PINs • a five-digit budget sequence number • '90000' for adding a new graduate assistant PIN, or • d) '99999' for adding a new budgeted PIN |
| D1 | Iteration | Number or Blank (which by default will be the last iteration on the database) |
| E1 | Screen | Valid Code or Blank (which by default will go to the PO screen): PO - Position/Occupant/Salary AS - Source AC - Comment |
| F1 | Year | Fiscal Year selected must either be on Table Database, Screen 413, Fiscal Year Maintenance Table or Blank (default current FY on Screen 413) |

PROCESSING NOTES

INQUIRY

In inquiry mode, the terminal operator is not able to effect any changes to any of the data elements on any of the Active Budget Screens. The cursor is limited to move to fields that may be changed that will cause a different record in the Active Budget to be displayed.

CORRECTION

This mode is most frequently used to make a minor change in a position which results in no fiscal impact. It is most often used to correct an error made through the Iteration mode. Examples would include such items as correcting an employee's name and SSN. If it follows immediately after creating a new iteration, other items could be corrected which will have fiscal impact, such as correcting the rate of pay or the number of months budgeted.

Caution: This function should not be used to change the rate of pay resulting in a new budget action, such as a merit increase or to change the funding sources for the remainder of a fiscal year.

On the Position Occupant Screen (051), changes are entered in the R or recommendation line on the screen, and the data will overlay the C or current line. To blank out an optional field (like Source Control), enter all dashes (----) in the field.

NEW ITERATION

This function is used to define a new status for a position. This function should always be used if the new situation alters the fiscal impact of a position, either through increasing or decreasing the funding requirement or altering the distribution of the funds among the various funding sources. This would include such items as merit increases, new funding sources (new research contract), changing the percent effort or changes in period of employment. On the Position/Occupant Screen (051), the current situation is displayed on the C line and only those items being changed need to be entered on the R or recommendation line. Those items not changing will be brought forward to the new

iteration. The iteration effective end date will be automatically updated on the old iteration to be the day previous to the effective start date of the new iteration. As with the correction mode, to blank out a field, enter all dashes (----).

NEW PIN

This function is used to create a new position in the Active Budget. Required data fields must be entered and edits passed before segments are entered into the database. Some required fields may be left blank and the program will update these fields with either system defaults or defaults defined in other databases (such as the FLSA code in the Tables database for Title Codes). The terminal operator has the option of specifying the PIN to be used or letting the BPP System calculate the next available PIN. The new system calculated PIN for budgeted positions is not displayed until the Position/Occupant/Salary Screen (051) has been processed successfully. The new number is presented on the Source Screen (052) after the 051 screen has completed processing the information. All required data fields must pass system edits before the data is stored in the Active Budget database. There are some fields that, if left blank, will be filled with default values (i.e., FLSA code will be set to default value defined on the Title Code table). Data is entered into the **R** or recommended line of the Position/Occupant Screen (051).

SCHEDULE FORM 500

This function is used to flag a particular iteration of a position for printing. There are two types of Form 500s generated, based on the iteration status code. A Form 500T is generated if the iteration status code is set to **C**. Only the current situation of the PIN is printed on the **C** or current line of the Form 500. If the iteration status is **S** or **P**, then a comparison is made between this iteration and the preceding iteration with an iteration status of **C**, **S**, or **P**. Any funding changes will be analyzed and identified. The flagged iteration will appear on the **R** line of the Form 500 while the data from the preceding iteration will appear on the **C** line.

WITHDRAW FORM 500

This function is used to stop the printing of a Form 500 that had been previously scheduled to print. This function should not be confused with the "withdraw" iteration status - which means that a particular iteration is not approved and has been withdrawn from consideration for budget and payroll processing. This function has no effect if the Form 500 has already been printed, and since the scheduled forms are printed each evening, there is most likely little opportunity or need to use this function.

MESSAGES UNIQUE TO THE FUNCTION SELECT SCREEN

1. **DATA BASE UPDATED - SCHEDULE FORM 500?** - A correction has been made to the database, and the operator is being given the option of scheduling a FORM 500 for later printing.
2. **FORM 500 SCHEDULED - PIN XXXXXXXXXXXX** - The indicated PIN has been scheduled for later printing of a FORM 500.
3. **FORM 500 WITHDRAWN - PIN XXXXXXXXXXXX** - The indicated PIN has been withdrawn from FORM 500 scheduling (i.e. no FORM 500 will be printed).
4. **INQUIRY COMPLETE** - All inquiries to the previously selected PIN have been completed.
5. **NEW ITERATION ADDED - SCHEDULE FORM 500?** - The indicated iteration has been added to the database, and the operator is being given the option of scheduling a FORM 500 for later printing.
6. **NEW PIN ADDED - SCHEDULE FORM 500?** - The indicated PIN has been added to the database, and the operator is being given the option of scheduling a FORM 500 for later printing.
7. **PIN ALREADY EXISTS ON DATA BASE** - An attempt was made to add a wage PIN to the database, but the specified PIN was already on the database for the selected fiscal year.

8. **PIN HAS '?' ITER. STATUS - NOT SCHEDULED** - An attempt was made to schedule a FORM 500 for a PIN, but the PIN had the indicated iteration status.
9. **REQUESTED PIN NOT ON DATA BASE** - The selected iteration of the requested PIN was not on the database for the fiscal year selected.
10. **FUNCTION NOT ALLOWED AT THIS TERMINAL** - The user attempted to perform a function which is not allowed at the terminal in use. If the terminal should be allowed to perform the requested function, contact the B/P/P Operations Center.
11. **PIN REACTIVATED - SCHEDULE FORM 500?** - The indicated PIN has been reactivated on the database and the operator is being given the option of scheduling a FORM 500 for later printing.