ADOA – General Accounting Office QUICK REFERENCE GUIDE: CREATE A CAM – MODIFY A PROGRAM PERIOD (PPC)





Create a CAM – Modify a Program Period

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Create a CAM – Modify a Program Period

The purpose of this quick reference guide (QRG) is to provide a step-by-step guide on how to modify a Program Period (PPC) by creating a Cost Accounting Modification (CAM) transaction. This QRG will also explain why users must use a CAM transaction when modifying an existing PPC.

Create a New Cost Accounting Modification (CAM) Transaction

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Transaction

Inquiry

CAM

Log in to the AZ360 Home Page. Create a CAM.

- 1. Click the **Expand** caret next to the **Global Search** field.
- 2. Select the Page Code option.
- 3. In the **Global Search** field, enter *CAM*.

- In the drop down menu that generates, select CAM Cost Accounting Modification. The CAM Financial Transaction page will generate.
- 5. Click the **Create** button.
- 6. In the **Transaction Department** field, enter the user's department 3-digit code. In this scenario, enter *ADA*.
- 7. Select Auto Numbering check box.
- 8. Click Continue.



Create Transaction		Continue
		* Required field
* Transaction Code	* Transaction Dept	Transaction Unit
* Transaction ID	🧭 Auto Numbering	Create Template
 Show Less 		

 A new CAM transaction will generate and opens to the Header tab. Note that the transaction is in **Draft** phase, the **Version** number is **1**, the **Function** is **New** and the **Status** is **Held**.

Header Tab

The Header tab is not required for the CAM to validate. However, it is encouraged to reflect the reason for creating the CAM in the Transaction Description field to allow the reviewer an understanding of the purpose of the CAM.

1. Enter a description for the purpose of the CAM in either the **Transaction Description** field, or the **Extended Description** field, if more than 60 characters are required.

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	Transaction	n Name		MM	rd Date			Fiscal Year		Period				
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	 Extend Extended Description 	led Description												

2. Click the Major Program tab.

Major Program Tab

The Major Program tab is required for the transaction to validate.

- 1. On the Blue Line:
 - a. In the **Department** field, enter the user's department 3-digit code. In this scenario, enter *ADA*.



- b. In the **Major Program** field, enter a code to identify the Major Program. In this scenario, enter *CDCMP*.
- c. Click the 3-dot menu, Related Actions, then click Load Major Program Details. All of the current data on the Major Program (MJPRG) reference table for Major Program record CDCMP loads into the CAM. Verify that the Major Program Details have loaded into the CAM by reviewing the data.
 If Program Period records for the Major Program need to be updated, a user *must* select Load Program Period Details. All existing Program Period records for that Major Program will be loaded into the Program Period tab of the CAM transaction. If a user does not select Load Program Period Details, they will receive an error stating, Program Period Sequence is required.

Note: Do not click the Load Program Period Details button more than once. Clicking the Load Program Period Details option more than once will load all of the PPC records once for each time the option is used, creating duplicate PPC record lines. A CAM transaction will not validate if there duplicate PPCs and the lines will have to be deleted.

2. Click on the **Program Period** tab.

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E.	Depart	nent: ADA	Unit: • Transactio	on ID: 240000000101 Version: 1										
		Header		Major Program	Program	Program Phase	Program Period (2)	Funding Profile	Funding Priority	Funding Line	Funding Profile Inferen	nce		
				Name CDC Grant Major Program	Name	Phase Short Name	Program Period Name QRG Program Period 2	Funding Profile Name	Funding Priority	Funding Line	Funding Profile Inference	щ ^		
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			Department			Major Program	-		N	me			Attachments	
	10	•	ADA	R		CDCMP		E.	4	DC Grant Major Program			•	1
2												Load Major Program Details	Related Actions	-,
•												Load Program Period Details		

Program Period Tab

Due to selecting the Load Major Program Details option on the Major Program tab, the Program Period tab has populated with a line type of Modify for each Program Period on the PPC table for the selected Major Program.

Quick Reference Guide

	Name Nam CDC Grant Major Program	ne Phase Shert	Name Program Period (2) Name Program Period Name	Funding Profile	Funding Priority	Funding Line Funding Profile Inference Funding Line Funding Profile Inference	
Major Program							
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1 - 2 of 2 Records			View per Page -	20 50 100			≪ < Page1of1 >
Line Type	Department	Major Program	Program Period		Infer From	Infer To	Attachments
Modify	ADA	CDCMP	QRG1		01/01/2018	12/31/2018	1
General Inform	ation General Options Fund	ling Identification					
Major Program Name CDC Grant Major Program			Program Period Name QRG Program Period 1		_	Short Name QRG PPC 1	
Active Yes	~		Budgeting Yes	~	L	Program Period Sequence	
Show More							
 Modify 	ADA	CDCMP	QRG2		01/01/2019	12/31/2020	0
General Inform	ation General Options Fund	ling Identification					
Major Program Name CDC Grant Major Program			Program Period Name QRG Program Period 2		_	Short Name QRG PPC 2	
Active			Budgeting Yes		- F	Program Period Sequence	

Note: Program Period Sequence cannot be manually entered into a transaction. Program Period Sequence can only be added to the transaction through use of the Load Program Period Details button.

- 1. Select the line which corresponds to the Program Period in need of modification.
- 2. Make the needed field changes to the Program Period.
 - a. <u>For example purposes only:</u> All expenses have been paid and activities completed for the grant represented by Program Period QRG1 (Program Period Sequence 1). Select **No** on the Active and Budgeting drop down menu fields for QRG1 to prevent any future transactions from impacting that PPC.

	<	Header	Major Program Name CDC Grant Major Program	Program Name . III	Program Phase Program P Phase Short Name Program Per , CRD Program	Period (2) Funding Profile iod Name Period 1	• Funding Priority Funding Priority	Funding Line Funding Profile In	e inference		~ >
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8	1	- 2 of 2 Records	Department	tt Major Prog	am Program Period	View per Page - 🕥 50 100 d	Infer From	Infer To		< C Page 1 of 1 > Attachments	*
18. 181	ľ	Modify	ADA	CDCMP	QRG1		01/01/2018	12/31/2018		•	÷
		Major Program Name CDC Grant Major Program	ouneral options	Furning lot number of the	Program Period Name QRG Program Period 1			Short Name QRG PPC 1			
		Active No	×		Budgeting No	~		Program Period Sequence			
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		Modify	ADA	CDCMP	QRG2		01/01/2019	12/31/2020		0	-
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3. Click Save.

4. To modify more than one Program Period, select the line that represents the next Program Period in need of modification.



- 5. Make the needed field changes to the next Program Period.
- 6. Click Save.
- 7. Click the Validate button to check for errors.
- 8. Click Submit.

Nar	ne Name	Program Phase Phase Short Nam	e Program Period (2) Funding Port Program Period Name Funding Port Office Program Period 2	Profile Funding Priority refile Name Funding Priority .	Funding Line Funding Profile Inference Funding Line Funding Profile Inference	
Major Program						
C ~41 0 0 0 0 +						5
1 - 2 of 2 Records			View per Page - 😰 50 100			< < Pagelof1 >
Line Type	Department	Major Program	Program Period	Infer From	Infer To	Attachments
Modify	ADA	CDCMP	QRG1	01/01/2018	12/31/2018	0
General Information Major Program Name	General Options Funding Id	lentification Pre	ogram Period Name	Short	Name	
General Information Major Program Name CDC Grant Major Program Active No	General Options Funding k	Ientification Pro QR Bu No	ogram Period Name 16 Program Period 1 dgetting	Short QRG I Progr	Name PPC 1 am Period Sequence	
General Information Major Program Name CDC Gram Major Program Active No I Show More	General Options Funding to	Jentification Pro QR Bu No	ngram Period Name Di Program Period 1 Ingerling	Sheri Gidi J Progr 1	Name PC1 um Period Sequence	
General Information Major Program Name CDC Gram Major Program Active ▶ show More No	Oeneral Options Funding is	Ientification OR DB Ne CDCMP	ogram Period Name G Program Period 1 digering CRG2	Sher GRJ 1 91(81/2019 🔯	Name PPC 1 am Period Sequence 12/31/2000	,
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General Information Major Program Kame CCC Garet Mayor Program Active Ne Ne Network Ne Modely General Information Major Program CCC Garet Mayor Program	Oeneral Options Funding Id ADA Oeneral Options Funding Id	entification Product of Product o	regen Period Name IS Program Period 1 dening 3 gans Period Name ISG Program Period 2	9663 0663 9999 1 01.01/2019 00 060	Name 990 1 12/31/2000 (1) 12/31/2000	,

Once the CAM has gone through the workflow approval process and is submitted to Final Phase, any changes made to the lines in the Program Period tab of the CAM will be reflected on the corresponding records on the PPC reference table.

The following "After" screenshot shows the record on the PPC reference table after the CAM transaction has been approved to Final Phase. Notice for QRG1, our selected Program Period, both the Active and Budgeting have "No" values, reflecting the changes from the CAM transaction.

ж б	Program Period 🗢				Edia (Cancel Ø Attachments
						* Required fields
۵	 General Information 					
8	Department ADA	Major Program CDCMP	Major Program Name CDC Grant Major Program			
	Program Period Sequence	Program Period QRG1				
6.	Program Period Name QRG Program Period 1	Short Name QRG PPC 1	Program Period Infer From 01/01/2018	Program Period Infer To 12/31/2018		
6	Active No	Budgeting No	Major Program Effective Start Date	Major Program Effective End Date		
	Contact	Description				
-						
	> General Options					
	> Funding Identification					