ADOA – General Accounting Office

QUICK REFERENCE GUIDE: CREATING A CAM: MODIFYING A PROGRAM PERIOD (PPC)

Creating a CAM: Modifying a Program Period (PPC)

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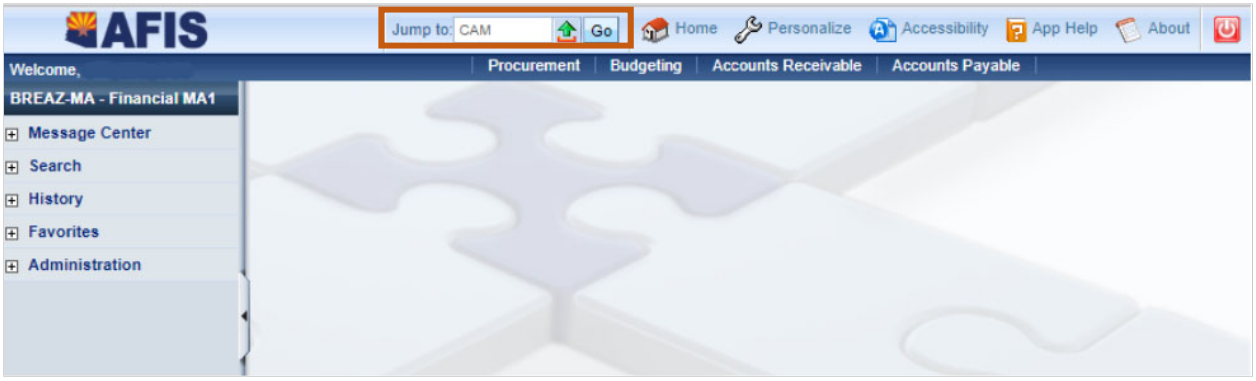
OVERVIEW - MODIFYING A PPC

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

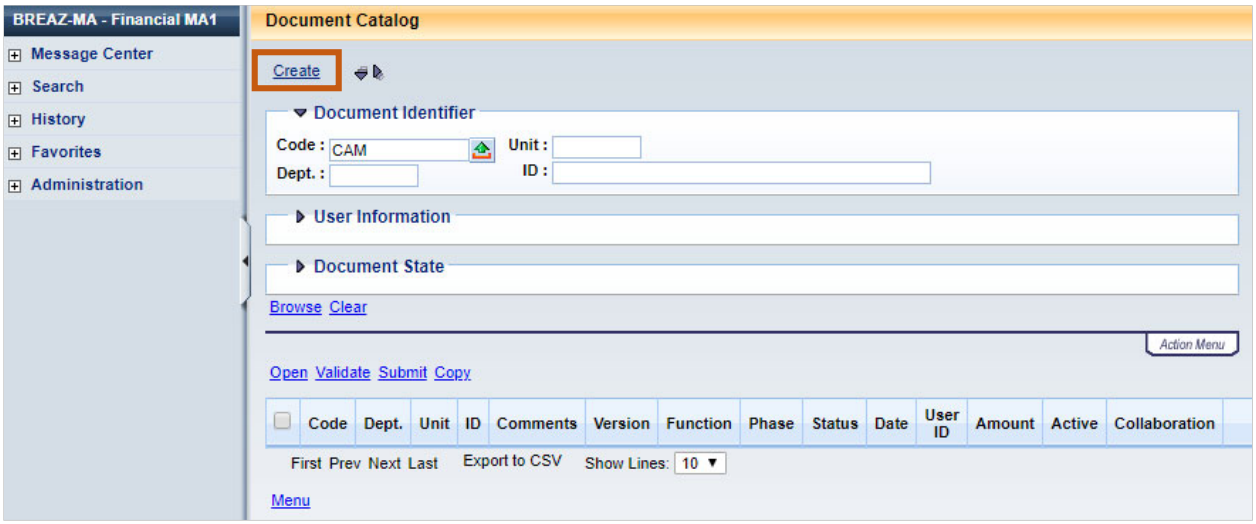
Creating a CAM

Once you have logged into AFIS, from the Home Page:

1. In the **Jump To** field, type CAM
2. Click **Go**



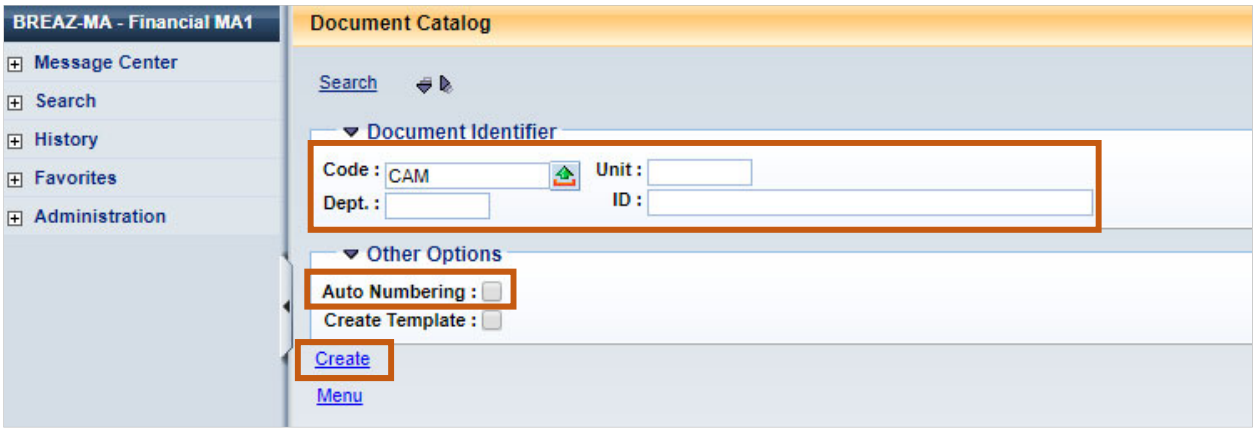
3. Click the **Create** button



4. In the **Code** field, CAM has been pre-populated after using the Jump To field
5. In the **Dept** field, type your three digit AFIS agency code
6. In the **ID** field, enter a unique name for your CAM document

Note: You have the option to give your document a unique ID, making the document easier to find and research or you can allow the system to generate an ID by Auto Numbering.

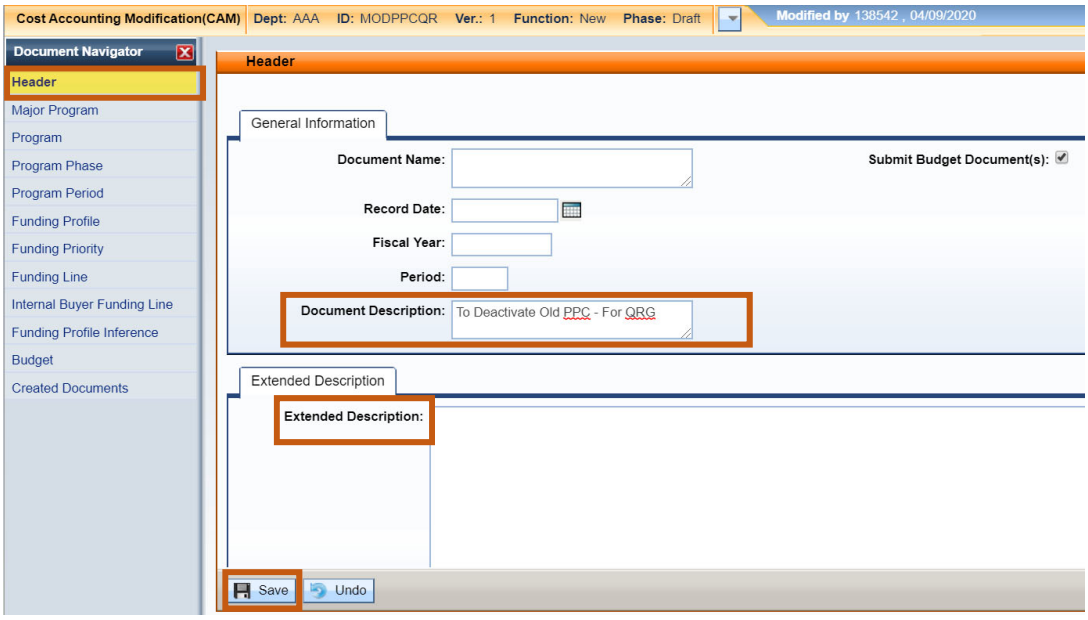
7. Click **Create** at the bottom left of the screen



Header Component

The Header Component is not required for the document to validate. However, it is encouraged to include a description specifying the reason for the CAM in the **Document Description** field. Including a description in the Header allows the reviewer to understand the purpose of the CAM.

1. In the **Document Description** field, type the reason for creating the CAM
2. Click **Save**

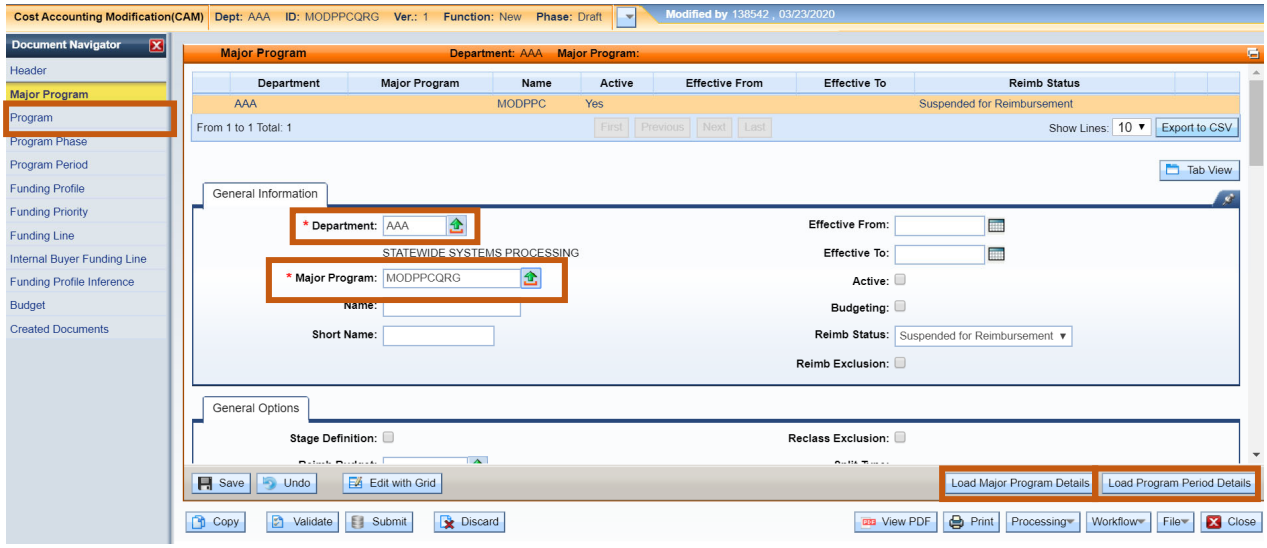


Major Program Component

The Major Program component is required for the document to validate.

Note: Fields with red asterisks are required fields. All other fields are based on departmental processes within each agency.

1. Navigate to the **Major Program** component using the Document Navigator on the left side of your AFIS screen
2. In the **Department** field, type or select your three-character AFIS agency code
3. In the **Major Program** field, type or select the Major Program from which you want to modify a Program Period
4. Click the **Load Major Program Details** button at the bottom right of the AFIS screen
    - Clicking the Load Major Program Details button will load the current information on the Major Program reference table (MJPRG) into the CAM document.
5. Click the **Load Program Period Details** button, also at the bottom right of the AFIS screen
    - Clicking the Load Program Period Details button will load all of the Program Periods associated to the Major Program and currently on the Program Period reference table (PPC). All existing Program Periods on the PPC reference table for the selected Major Program will be loaded into the CAM document after clicking the Load Program Period Details button. Upon finalization of the CAM, only the Program Periods that have fields changed in the CAM document will have their associated records on the PPC reference table updated.

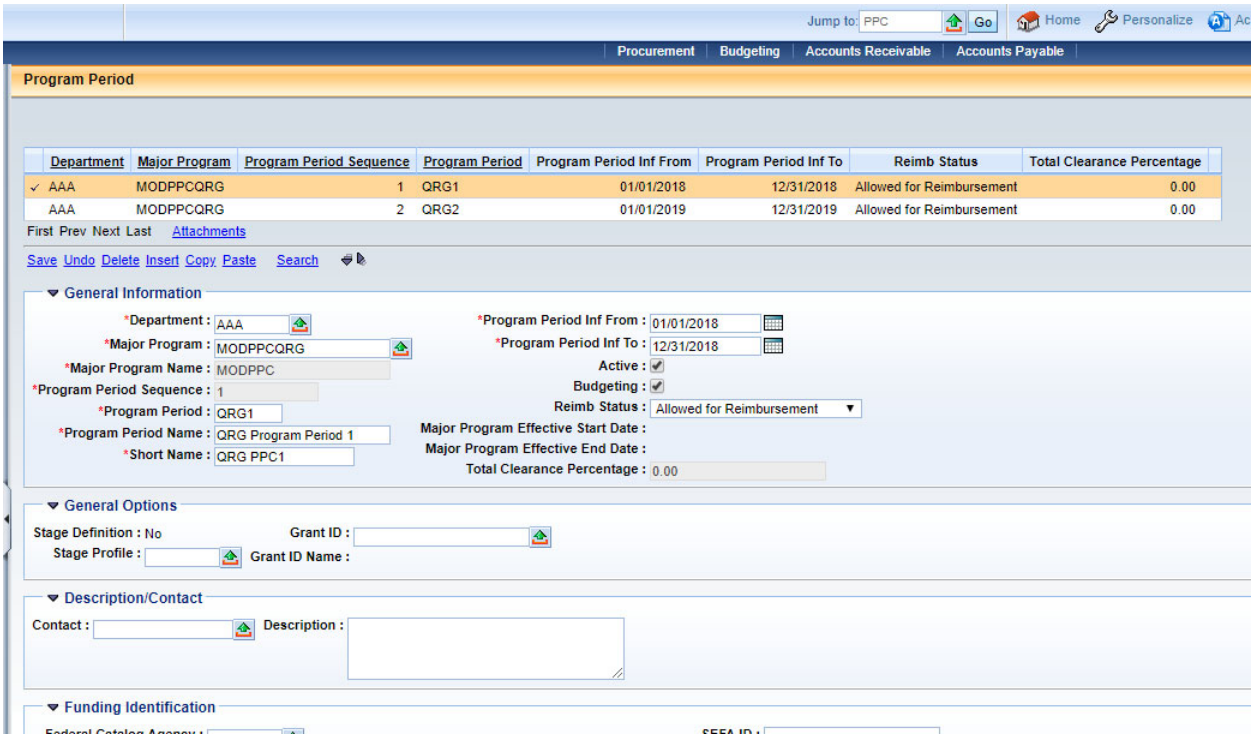


Important: Use of the Load Program Period Details button is required when modifying a Program Period.

Note: Do not click the Load Program Period Details button more than once. Clicking the Load Program Details button more than once will load all of the associated Program Periods on the PPC reference table as many times as you click the Load Program Period Details button. You will be required to delete the duplicated lines to validate the document.

Note: The various Load Details buttons are helpful, unique features of CAM documents. They do not exist in Cost Accounting Setup (CAS) documents. The Load Details buttons save time and significantly reduce the risk of manual data entry errors.

The following "Before" screenshot shows the records on the PPC reference table which load into the example CAM doc when clicking the Load Program Period Details button.

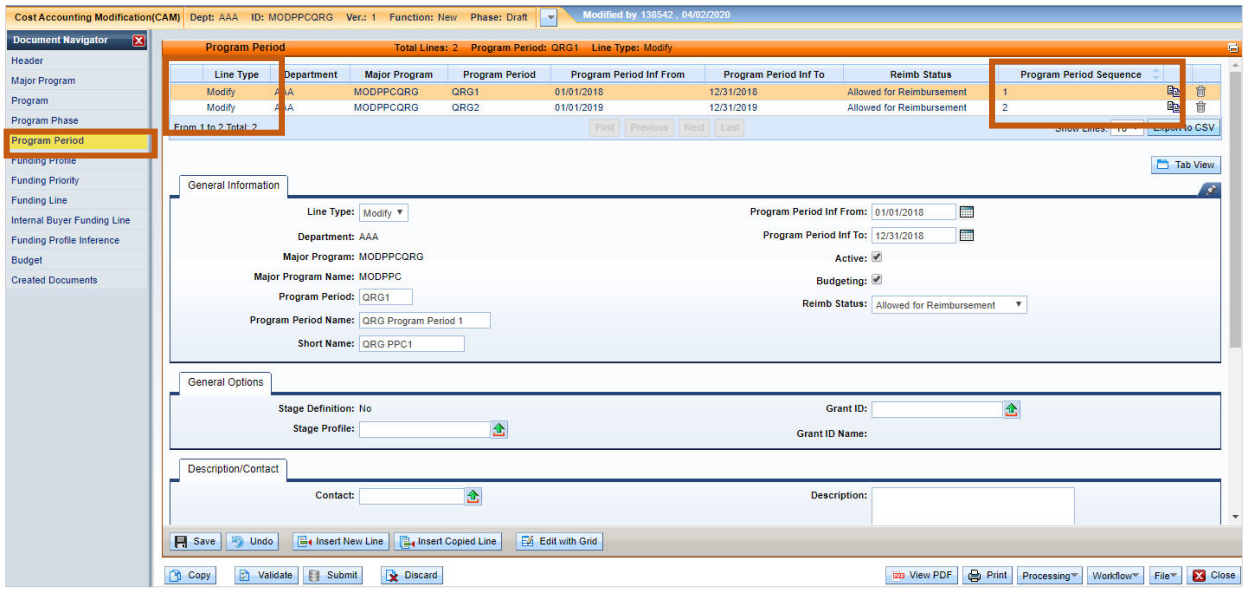


Program Period Component

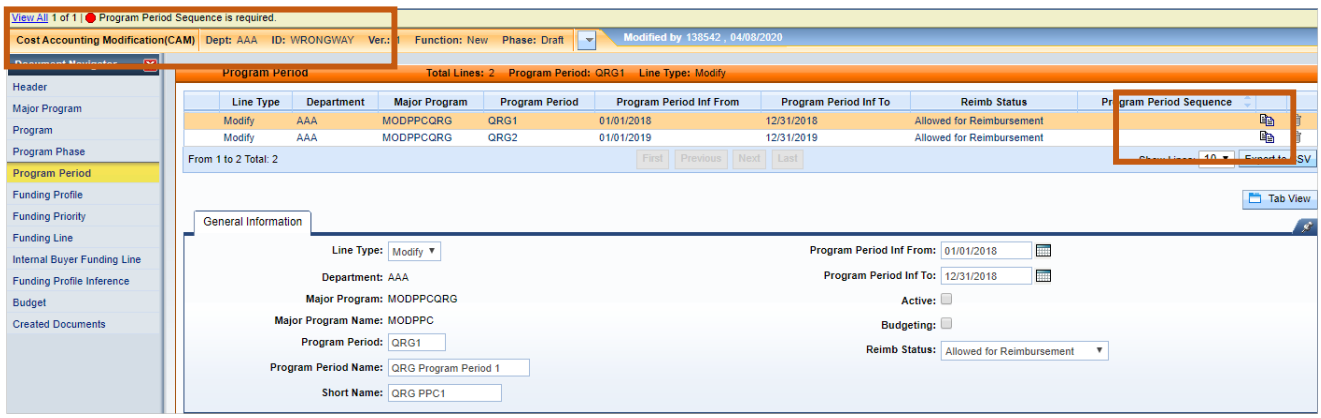
1. Navigate to the **Program Period** component using the Document Navigator on the left side of your AFIS screen

Since we clicked the Load Program Period Details button in the Major Program component, the Program Period component has been populated with a line type of **Modify** for each Program Period on the PPC table for the selected Major Program.

Notice the Program Period Sequence on the right side of the two lines in the Program Period Component. **Program Period Sequence** is a logic the system uses to identify and order the Program Periods of a Major Program. It is established by the system when a Program Period is added to the PPC table.



Important: Program Period Sequence cannot be manually entered into a document. Program Period Sequence can only be added to the document through use of the Load Program Period Details button. This is why the use of the Load Program Period Details button, which exists only in a CAM document, is required to modify a Program Period. An error of "Program Period Sequence is required" will be received upon validation when trying to modify an existing program period by manually entering lines. To fix this error, delete the lines in the Program Period Component, go back to the Major Program Component and click the Load Program Period Details button. The following screen has an example of the error:



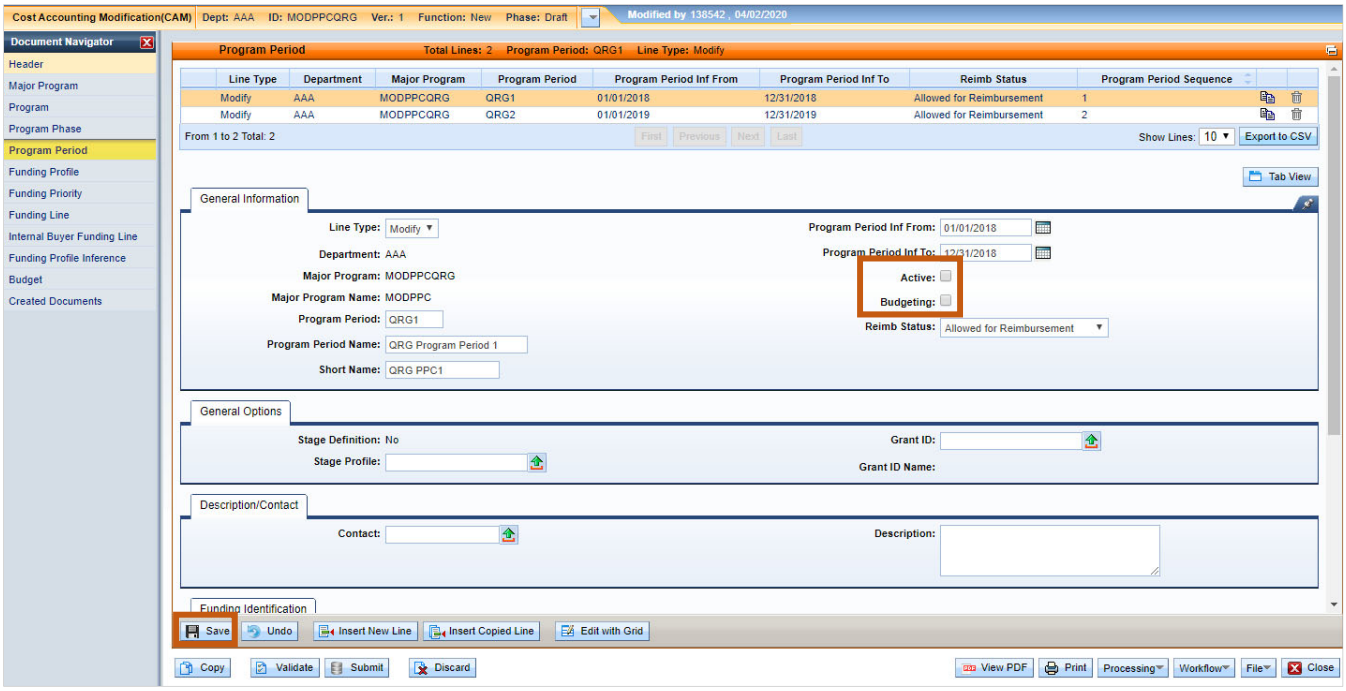
Now that the current Program Period details have been loaded into our CAM document, we can make modifications to the Program Periods.

2. **Select** the line which corresponds to the Program Period which you would like to modify

3. Make the desired changes to the fields of your program period

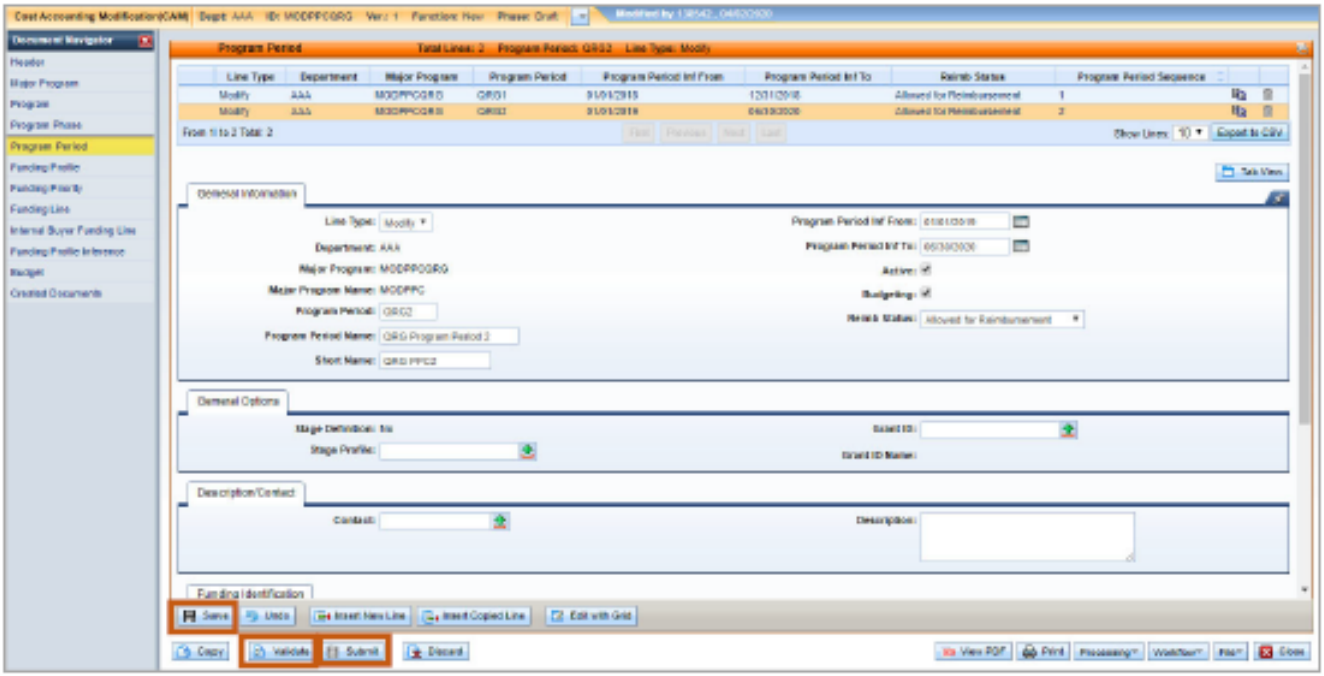
   - <u>For example purposes only:</u> All expenses have been paid and activities completed for the grant represented by Program Period QRG1 (Program Period Sequence 1). We want to uncheck the Active and Budgeting boxes for QRG1 to prevent any future transactions from impacting that PPC.

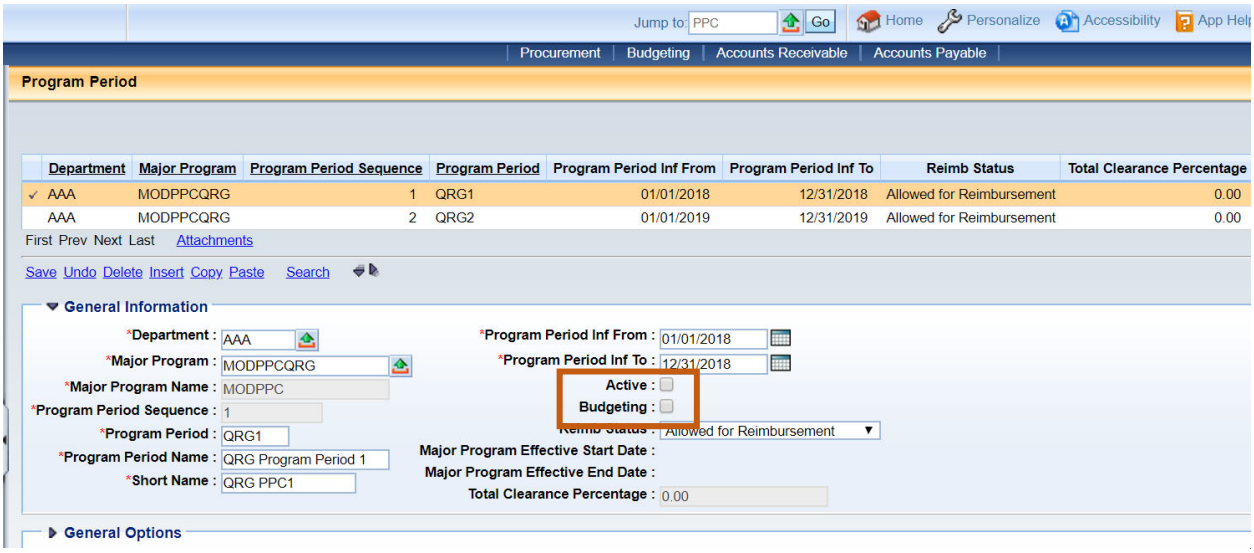
4. Click **Save**



5. To modify more than one program period, select the line that represents the next program period to be modified

6. Make the desired changes to the next program period
7. Click **Save**
8. Click **Validate** to confirm there are no errors
9. Click **Submit**



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 component 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 document has been approved to Final Phase. Notice for QRG1, our selected Program Period, both the Active and Budgeting boxes are no longer checked, reflecting the changes from the CAM document.