Maintain Template Structures (ASTR)

The ASTR documentation can be broken down into the following categories:

- Structuring Introduction
- Structure Add
- Structure Modify
- Structure Clone
- Structure Inquiry
- Structure Browse (All)
- Structure Browse (by Creator)
- Structure Delete
- Structure Print

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Structuring Introduction

A structure is used to capture financial data input through FANS. A structure is a format for collecting the income/expenses of an account, group of accounts, or a cost center in a meaningful order for financial management to meet the needs and requirements of the area.

A structure is comprised of one or more structure elements (line item). The structure element description can be up to 30 characters. A structure element in a structure other than the University Structure will be known as a Department Object.

- A structure element can be a Non-Total line in which the central object codes are related.
  - Multiple central object codes can be grouped together in one structure element.

  **Example:**
  SUPPLIES 0301, 0303, 0309, 0310

- Central object codes can be related to more than one non-total structure element.

  **Example:**
  PENS/PAPER  0301
A structure element can be a line in which other structure elements are added.

A structure element can be a **Title** line, or an information-only structure element, which is neither non-total nor total. There will be no amount figures on these lines.

A structure can be associated to an account, or to any type of cost center previously mentioned. In order for a cost center to correct data, it must have at least one structure associated to it. You may create up to two structures in addition to the University Structure.

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**Adding a Structure — ASTR**

A **Structure** is a grouping of line items (structure elements) to capture, or map out, the details of an account, group of accounts, or a cost center to meet the financial information needs for that account. Within the structure, the structure elements are directly related to the central object codes. The structure is merely a format for collecting your income/expense details in meaningful order for management and reporting. The structure must be **associated** to an account, a group of accounts, a cost center, or an activity before it can begin to capture the details in the format.

At **NEXT FUNCTION** in the **IBIS Admin Menus** in **CCOM**, type **ASTR** (Pure Structure Maintenance) and press **Enter**.
1. Press **PF4** to add a structure.

1. At **Structure ID**, enter the name your structure (up to 5 characters).

2. At **Short Title**, enter a short title of your structure (up to 10 characters).
3. **At Long Title**, enter a long title of your structure (up to 30 characters).

4. **At Alternate Creators**, enter the userIDs of those people who will be able to modify and update the structure. Do not include yourself since you are the original creator.

5. The **Will This Structure Be Confidential** question will default to **N** (no) but can be modified. If this is changed to **Y** (yes) only you and the alternate creators can view this structure format.

6. The **Overdraft Control on Unassigned Line** question will default to **N** (no) but can be modified. At the end of every department structure, all object codes not related within the structure elements are "dumped" into an **unassigned** structure element line. You can indicate whether or not you want overdraft control on this line.

7. The **Will This Structure Associate All Object Codes** question will default to **Y** (yes). This should be yes for all department structures. Only structures which can forego relating all the central object codes will be associated to spanning Cost Centers or university-wide Cost Centers.

8. The **Will This Structure Require Monthly Accrual Posting** question will default to **N** (no). This is currently not available.

Press **PF8** to enter the structure elements for your structure.

<table>
<thead>
<tr>
<th>LINE NUMBER</th>
<th>STRUCTURE ELEMENT</th>
<th>OVER DRAFT</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SALARIES</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>2</td>
<td>ACADEMIC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>OTHER SALARIES</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>4</td>
<td>EXEMPT STAFF</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>5</td>
<td>NEXEMPT STAFF</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>6</td>
<td>TECH SALARIES</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>7</td>
<td>BUS DRIVERS</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>8</td>
<td>DEPARTMENT ALLOT.</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>9</td>
<td>FUEL</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>10</td>
<td>DIESEL-LOW</td>
<td>N</td>
<td>N</td>
</tr>
</tbody>
</table>

A **structure element** is a line item in a structure. The description of the structure element can be up to 30
A structure element will either be a non-total line item in which central object codes are related, or it can be a total line in which other structure elements are added. You can even have informational-only structure elements which will be neither non-total or total. These will be title lines in your structure.

1. **At Structure Element**, enter the name of the line items in your structure.

   **> Note:**
   If you wish to indent the title of a structure element, you must manually add spaces to the line.

2. **At Over Draft**, indicate if this element line should have over draft control. A **Y** (yes) at Over Draft prohibits posting to a structure element that has insufficient funds available.

3. **At Total Line**, indicate if this element line is a total line. A total line will not have any central object codes related to it, but will be a line for summing together other structure element lines.

   **> Note:**
   You can only enter 10 structure element lines at a time. We suggest that you map your structure out on paper first and then split your element lines out by 10s. This will make it easier for you to enter your structure on-line.

   **Press PF12 to process the structure elements when you have entered all of your structure element lines or when you have entered 10 structure element lines (whichever comes first).**

When **PF12** is pressed, a pop-up window will appear for the structure element lines entered on the previous screen.

For each **non-total** line, a pop-up window, similar to the one below, will appear asking the creator to relate the central object codes to that structure element line. The title of your structure element line that you are relating object codes to is located in the upper left corner of the pop-up window.
1. If the line element you are entering includes a range of central object codes, you can enter the first object code in the range at Begin Range.

If you are entering a range, enter the last object code in that range at End Range.

> Notes:
- The system will read letters before numbers, so if you want codes 010B, and 0101-0199, you can specify the range 010B-0199.

- The object code must be entered with a preceding 0.
  **Example:**
  301 should be entered as 0301.

— and/or —

2. Enter the specific central object codes to be included in this line element.

> Note:
Press PF1 for a list of all of the central object codes.

> Note:
If you enter an invalid object code into a range, the system will accept your PF12 but will not use the invalid code. If you enter an invalid code as a separate item, the system will make you change it.
Press PF12 when you are finished entering the object codes for that structure element.

When all of the **NON-total structure element** lines have been related, a pop-up window will appear to identify the lines to be summed up in the **Total** lines.

For each Total Line, a pop-up window will appear asking the creator to select the **structure element** lines which should be added together in the **total** lines.

The title of your total line that you are relating **structure element** lines to is located in the upper left corner of the pop-up window.

![Example Pop-up Window]

1. Place an X beside the structure lines that will be added together to make the total line you are completing.

> **Note:**
You can press **PF7** and **PF8** to move backward and forward through the structure element lines.

**Press PF12 to process the structure element lines that will make up the total line.**

**Press PF9 to add your structure once you have processed all of your structure element lines.**

The system will automatically add three lines to your structure for unassigned objects: **Unassigned**
Income, Unassigned Expenses, and Unassigned Expenses I.

After you have created a structure, you will want to associate the structure to an account or group of accounts. This is discussed in the UASC document.

**Other Functions**

Below is a list of other functions that can be used when creating a structure.

<table>
<thead>
<tr>
<th>Function</th>
<th>PF Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modify a Line</td>
<td>PF3 (LINE)</td>
<td>If you need to modify the object codes included in a structure element or the structure element added together for a total line, place the cursor on the line to be modified and press <strong>PF3</strong>.</td>
</tr>
<tr>
<td>Insert a Line</td>
<td>PF5 (INSR)</td>
<td>If you need to add a structure element, place the cursor on the line where you want a new structure element and press <strong>PF5</strong>.</td>
</tr>
<tr>
<td>Delete a Line</td>
<td>PF6 (DELE)</td>
<td>If you need to delete a structure element, place the cursor on the line you want to delete and press <strong>PF6</strong>.</td>
</tr>
<tr>
<td>Backwards</td>
<td>PF7 (BKWD)</td>
<td>Allows you to move backwards through the structure.</td>
</tr>
<tr>
<td>Forwards</td>
<td>PF8 (FWRD)</td>
<td>Allows you to move forwards through the structure.</td>
</tr>
<tr>
<td>Add a Structure</td>
<td>PF9 (ADD)</td>
<td>Once you have entered all of the lines for the structure, press <strong>PF9</strong> to add the structure.</td>
</tr>
<tr>
<td>ASTR Screen</td>
<td>PF10 (ASTR)</td>
<td>If you would like to return to the first screen of the ASTR (Pure Structure Maintenance) function, press <strong>PF10</strong>.</td>
</tr>
<tr>
<td>Print a Structure</td>
<td>PF11 (PRNT)</td>
<td>If you would like to print the whole structure, press <strong>PF11</strong>.</td>
</tr>
<tr>
<td>Process a Structure Element</td>
<td>PF12 (PROC)</td>
<td>Once you have entered all ten structure element lines for the first page of the structure, press <strong>PF12</strong> to process those lines.</td>
</tr>
</tbody>
</table>
Modify a Structure — ASTR

Once you have added a structure, you can use the Structure Modify function to make any changes to the structure.

At NEXT FUNCTION, type ASTR (Pure Structure Maintenance) and press Enter.

1. Press PF5 to modify a structure once it has been added.

1. At STRUCTURE ID, enter the name of the structure that you want to modify.

2. The PURE CREATOR field will automatically default to your userID but can be modified.
> Note:
You can only modify structures that you created or structures that have your userID entered as an alternate creator.

3. The START VALUE, will default to 1 but can be modified.
   **Example:**
   If you are going to modify the 55th line on your structure, enter 55 in the Start Value field and it will take you to the 55th line of your structure when you press **PF8** after you retrieve your structure.

**Press Enter to retrieve the structure to be modified.**

![Structure Element Lines](image)

1. You can modify the same fields that you completed when you added the structure.

   Press **PF8** to page forward through the structure and make any modifications needed.

   For more information on the specific fields and functions that can be used, see the Adding a **Structure** section above.

   **When you have completed your modification, press PF9 to save your changes.**
Clone a Structure — ASTR

You can clone a structure by using another structure (if it is not marked Confidential) as a template for your structure. You can pull in another structure, add it to the system as your own and then modify it if there are changes that need to be made.

At NEXT FUNCTION, type ASTR (Pure Structure Maintenance) and press Enter.

Press PF6 to clone another structure.

If you want to clone a structure you have already created . . .

Any non-confidential structure on the system will be displayed.

1. At Selection Number, enter the Line No associated with the structure you would like to clone.
Press PF12 to retrieve the cloned structure.

If you want to clone a structure created by another individual (that is not confidential) . . .

1. At Reposition to User-ID, enter the userID of the individual who created the structure you want to clone.

2. At Structure-ID, enter the name of the structure you want to clone, if known.

Press PF9 to retrieve the structure to be cloned.

> Notes:

- All structures created by the individual will be displayed.

- At Selection Number, enter the Line No associated with the structure you would like to clone.

Press PF12 to retrieve the cloned structure.
1. You can modify the fields on this page to reflect how you want your cloned structure to look.

For more information on the specific fields, read Add a Structure.

When you have completed your modification, press PF12 to clone the structure.

Once the structure has been cloned, you can use the Modify a Structure function to make changes to the line elements in the structure.

> Notes:

- If you get to this page and decide you do NOT want to clone this structure press PF9 to cancel the cloning process.

- If you would like to go back to the ASTR screen, press PF10.

Inquire a Structure — ASTR

If there is a specific structure you would like to view, use the Structure Inquiry function.
At NEXT FUNCTION, type ASTR (Pure Structure Maintenance) and press Enter.

1. Press PF7 to view a specific structure.

1. At Structure ID, enter the name of the structure you want to view.

2. The Structure Creator field will automatically default to your userID but can be modified. Enter the userID of the individual that created the structure.

> Note:
You will not be able to view any confidential structures that you are not either the structure creator or alternate creator.

Press Enter view the structure.
Press PF8 to page forward through the structure.

If you would like to view the object codes that are included in a structure element line, at Selection, enter the selection number associated with the line and press PF5.
If you would like to view what structure element lines make up a total line, at **Selection**, enter the selection number associated with the total line and press **PF6**.

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**Browse All Structures — ASTR**

If you want to view all non-confidential structures that exist on the system, use the **Structure Browse (All)** function. Within this function you can also modify a structure if you are the structure creator or alternate creator. You can also clone a structure if you find one in the browse function you want to clone.

At **NEXT FUNCTION**, type **ASTR** (Pure Structure Maintenance) and press **Enter**.

1. Press **PF8** to browse all non-confidential structures that exist in the system.
You can page forward (PF8) and backward (PF7) through the structures.

If you are looking for a structure created by a specific individual, at Reposition to UserID, enter the userID of the individual who created the structures you want to browse and press Enter.

If you know the name of the specific structure you want to browse, at Structure-ID, enter the name of the structure and press PF6.

> **Note:**
A userID must be entered at Reposition to UserID.

If you would like to browse a structure that is listed on the browse screen, at Selection Number, enter the Line No associated with the structure you want to inquire and press PF6.

> **Note:**
You can modify and clone structures using this browse function, by pressing PF5 and PF10 respectively instead of PF6 for inquiry. (You can only modify structures that you are listed as creator or alternate creator.)

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**Browse Structures by Creator — ASTR**

If you want to view all structures that you created, use the Structure Browse (by Creator) function. Within this function you can modify a structure that you created. You can also clone a structure if you find one in the browse function you want to clone.

At NEXT FUNCTION, type ASTR (Pure Structure Maintenance) and press Enter.

```
| PF4 | STRUCTURE ADD                  |
| PF5 | STRUCTURE MODIFY               |
| PF6 | STRUCTURE CLONE                |
| PF7 | STRUCTURE INQUIRY              |
| PF8 | STRUCTURE BROWSE (ALL)         |
| PF9 | STRUCTURE BROWSE (BY CREATOR)  |
| PF10| STRUCTURE DELETE               |
| PF11| STRUCTURE PRINT                |
```

1. Press PF9 to browse all the structures that you have created.
You can page forward (PF8) and backward (PF7) through the structures.

If you would like to browse a structure that is listed on the browse screen, at Selection Number, enter the Line No associated with the structure you want to inquire and press PF6.

If you know the name of the specific structure you want to browse, at Structure ID, enter the name of the structure and press PF6.

> Note:
You can modify and clone structures using this browse function, by pressing PF5 and PF10 respectively instead of PF6 for inquiry.

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Delete a Structure — ASTR

If you want to delete a structure that you created, use the Structure Delete function. You can only delete a structure if you are the structure creator or alternate creator. You can delete a structure if it has not been associated to an account or cost center.

At NEXT FUNCTION, type ASTR (Pure Structure Maintenance) and press Enter.
1. Press **PF10** to delete a structure that you have created.

2. At **Structure ID**, enter the name of the structure you want to delete.

   The **Structure Creator** field will automatically default to your userID but can be modified. Enter the user id of the individual that created the structure.

   **>Notes:**
   - You will only be able to delete any structures that you are either the structure creator or alternate creator.
   - You will not be able to delete a structure if it is associated to anything. You will have to disassociate it first with the **UASC** function or corresponding action in the client/server tool.

   **Press Enter to delete the structure.**
1. Enter Y at Are You Sure That You Want to Delete This Pure Structure.

Press Enter.

Print a Structure — ASTR

If you want to print a structure, use the Structure Print function.

At NEXT FUNCTION, type ASTR (Pure Structure Maintenance) and press Enter.

| PF4   | STRUCTURE ADD |
|PF5   | STRUCTURE MODIFY |
|PF6   | STRUCTURE CLONE |
|PF7   | STRUCTURE INQUIRY |
|PF8   | STRUCTURE BROWSE (ALL) |
|PF9   | STRUCTURE BROWSE (BY CREATOR) |
|PF10  | STRUCTURE DELETE |
|PF11  | STRUCTURE PRINT |

1. Press PF11 to print a structure.
1. At **Structure ID**, enter the name of the structure you want to print.

2. The Pure **Creator** will default to your userID but can be modified. Enter userID of the structure creator.

3. The **Print Object Codes** field will default to **Y** (yes) but can be changed to **N** (no) if you do want the object codes printed.

4. At **Print Destination (vtam ID)**, enter the ID of the printer where you want it to print.

   **Press Enter to print.**

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