

GeorgiaFIRST Financials V8

Announcement

POSTED: February 25, 2009

SUBJECT: New Budget Prep Instruction and Reference Documents

PURPOSE: To notify users at all institutions using GeorgiaFIRST PeopleSoft Financials Version 8.9 that two new Budget Prep Instruction and Reference documents are available.

FUNCTIONAL IMPACT: Two new Budget Prep Instruction and Reference documents are available to assist you during your Budget Prep activities.

1. A new **Budget Prep Query for Merit Increase Amounts Instructions** document provides instructions to build a query that will display Merit Increase Amounts.
2. A new **Key Records for Budget Prep Queries** document lists all the key records that you can query for Budget Prep.

SUPPORTING DOCUMENTATION:

1. The **Budget Prep Query for Merit Increase Amounts Instructions** document is attached for your use.
2. The **Key Records for Budget Prep Queries** document is attached for your use, and is also located in the **Reference Documents** section of the **Documentation** page on the GeorgiaFIRST Financials web site at: <http://www.usg.edu/gafirst-fin/documentation/>.

ADDITIONAL OIIT RESOURCES and SUPPORT: Contact the **OIIT HELPDESK** at http://www.usg.edu/customer_services (support request self-service) or e-mail helpdesk@usg.edu. For emergency, business interruptions, or production down situations, call the **OIIT HELPDESK** immediately (706-583-2001; or toll free within Georgia 1-888-875-3697).

CREATING A BUDGET PREP QUERY FOR MERIT INCREASE AMOUNTS in GeorgiaFIRST PeopleSoft Financials Version 8.9

You can use the following instructions to build a query that will display Merit Increase Amounts for your Budget Prep activities.

1. Select **Reporting Tools⇒Query⇒Query Manager**. This brings you to the **Query Manager** page.

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Query](#) | [Create New Query](#)

*Search By: begins with
 [Advanced Search](#)

[Find an Existing Query](#) | [Create New Query](#)

2. Click on the [Create New Query](#) link. The **Records** page displays.

Records
Query
Expressions
Prompts
Fields
Criteria
Having
View SQL
Run

Query Name: New Unsaved Query Description:

Find an Existing Record

*Search By: begins with

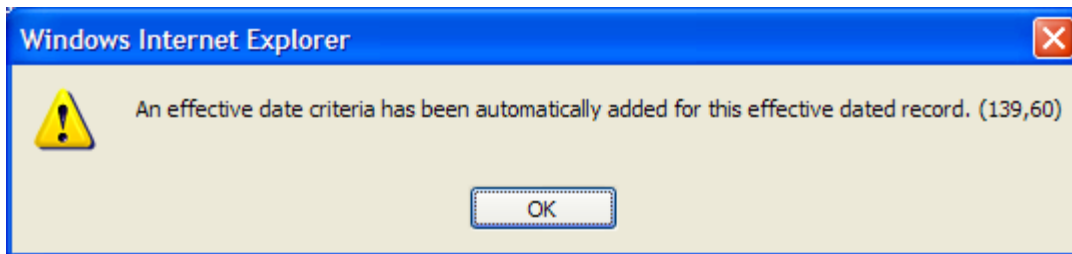
[Advanced Search](#)

Search Results

Record	Customize	Find	View All	First	1 of 1	Last
Record Name	Add Record					Show Fields
BUD_PSB_BOR - BOR Budgets PS	Add Record					Show Fields

[Save As](#)
[New Query](#)
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[New Union](#)

3. Enter **BUD_PSB_BOR** in the **Search By Record Name** field.
4. Click on . The **Search Results Record** list displays.
5. Click on the [Add Record](#) link for the **BUD_PSB_BOR –BOR Budgets PS** record. The following dialog box displays:

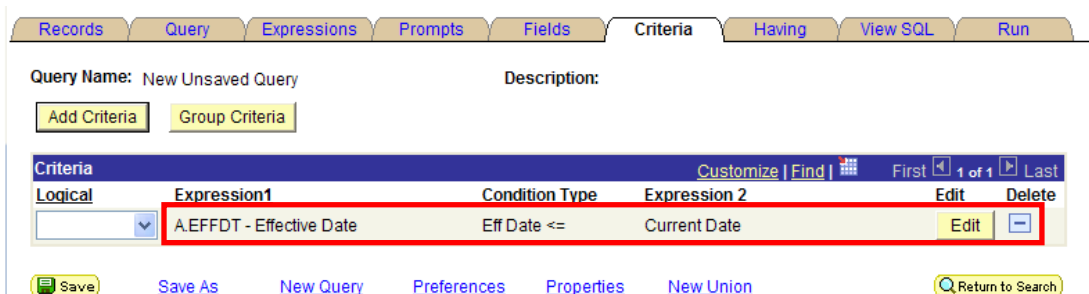


6. Click on . The **Query** page displays.

Fields	Find	View All	First	1-29 of 29	Last
<input checked="" type="checkbox"/> SETID - SetID					
<input type="checkbox"/> BUD_TYPE_BOR - BOR Budget Type					
<input type="checkbox"/> BUDGET_PERIOD - Budget Period					
<input type="checkbox"/> BUD_VERSION_BOR - Version for BOR					
<input checked="" type="checkbox"/> POSITION_NBR - Position Number					
	Join BUD_POSITION_VW - BOR Budgets Valid Period View				
<input type="checkbox"/> POSITION_POOL_ID - Position Pool ID					
<input checked="" type="checkbox"/> EMPLID - EmplID					
	Join BUD_JOB_VW_BOR - Departments				
<input type="checkbox"/> EMPL_RCD - Empl Rcd Nbr					
<input type="checkbox"/> EFFDT - Effective Date					
<input checked="" type="checkbox"/> DEPTID - Department					
<input type="checkbox"/> BUD_ORIGDEPTID_BOR - Budgets Original Department					
<input type="checkbox"/> DATE_FROM - Date From					
<input type="checkbox"/> JOBCODE - Job Code					
	Join BUD_JOB_CDVW_BOR - Departments				
<input type="checkbox"/> BUD_ORIGJOB_CDVW_BOR - Budgets Original Job Code					
<input type="checkbox"/> PAYGROUP - Pay Group					
	Join BUD_PAY_VW_BOR - Departments				
<input type="checkbox"/> BUD_ORIGPAYGRP_BOR - Budgets Original PayGroup					
<input checked="" type="checkbox"/> BUD_AMOUNT_BOR - Current Amount					
<input type="checkbox"/> BUD_EQUITYADJ_BOR - Equity Adjustment Amount					
<input type="checkbox"/> BUD_SUPPAMT_BOR - Supplemental Budget Amount					
<input checked="" type="checkbox"/> BUD_PERCENT_RATE - Percent					
<input checked="" type="checkbox"/> BUD_HRAMT_BOR - Proposed Salary					

7. Select the following fields for the **BUD_PSB_BOR** record:
- **SETID**
 - **POSITION_NBR**
 - **EMPLID**
 - **DEPTID**
 - **BUD_AMOUNT_BOR**
 - **BUD_PERCENT_RATE**
 - **BUD_HRAMT_BOR**

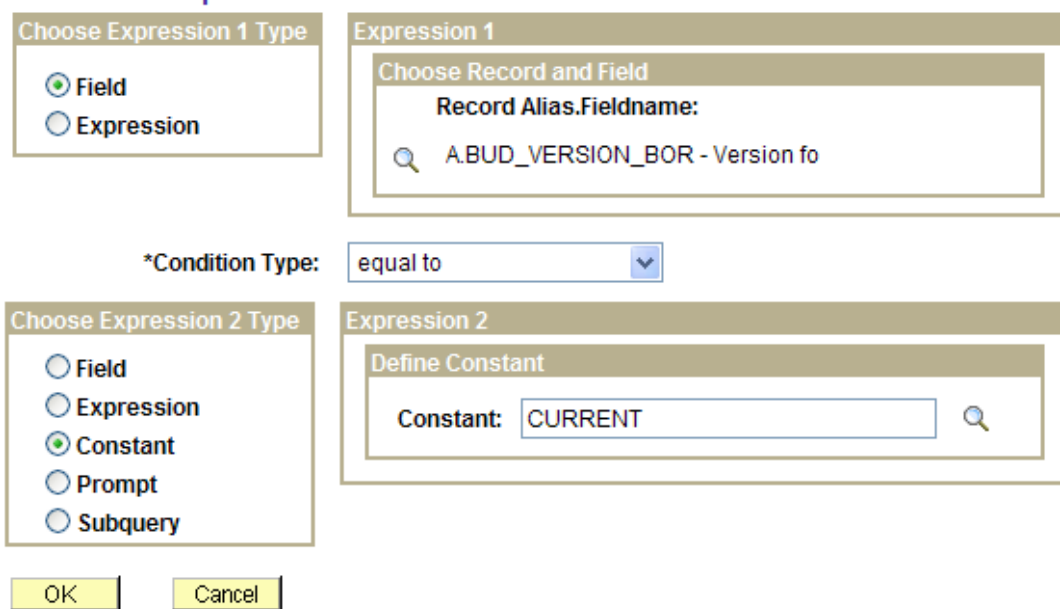
8. Click on the **Criteria** tab. The **Criteria** page displays.



9. Click on the  to delete the **A.EFFDT – Effective Date** criteria.

10. Click on . The **Edit Criteria Properties** page displays.

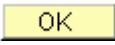
Edit Criteria Properties



11. Enter or select **BUD_VERSION_BOR – Version for BOR** as the **Record Alias.Fieldname** in the **Expression 1 Choose Record and Field** group box.

12. Verify the **Condition Type** is **equal to**.

13. Enter **CURRENT** in the **Expression 2 Define Constant** field.

14. Click on . This brings you back to the **Criteria** page.

[Records](#) [Query](#) [Expressions](#) [Prompts](#) [Fields](#) [Criteria](#) [Having](#) [View SQL](#) [Run](#)

Query Name: New Unsaved Query Description:

[Add Criteria](#) [Group Criteria](#)

Criteria	Expression1	Condition Type	Expression 2	Edit	Delete
Logical	ABUD_VERSION_BOR - Version for BOR	equal to	CURRENT	Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

15. Click on [Add Criteria](#). The **Edit Criteria Properties** page displays.

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

[A.BUDGET_PERIOD - Budget Perio](#)

*Condition Type: [equal to](#)

Choose Expression 2 Type

☐ Field
☐ Expression
☐ Constant
☒ Prompt
☐ Subquery

Expression 2

Define Prompt

Prompt: :1 [New Prompt](#) [Edit Prompt](#)

[OK](#) [Cancel](#)

16. Enter or select **BUDGET_PERIOD – Budget Period** as the **Record Alias.Fieldname** in the **Expression 1 Choose Record and Field** group box.

17. Verify the **Condition Type** is **equal to**.

18. Select the **Prompt** radio button in the **Choose Expression 2 Type** group box. The **Define Prompt** group box displays.

Define Prompt

Prompt: [New Prompt](#) [Edit Prompt](#)

19. Click on the [New Prompt](#) link. The **Edit Prompt Properties** page displays.

Edit Prompt Properties

Field Name:

***Type:**

***Format:**

Length:

Decimals:

***Edit Type:**

***Heading Type:**

Heading Text:

***Unique Prompt Name:**

Prompt Table:

20. Click on . This brings you back to the **Edit Criteria Properties** page.

21. Click on . This brings you back to the **Criteria** page.

[Records](#) [Query](#) [Expressions](#) [Prompts](#) [Fields](#) [Criteria](#) [Having](#) [View SQL](#) [Run](#)

Query Name: New Unsaved Query **Description:**

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="text" value="AND"/>	ABUD_VERSION_BOR - Version for BOR	equal to	CURRENT	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
	ABUDGET_PERIOD - Budget Period	equal to	:1	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

[Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#)

22. Click on the **Expressions** tab. The **Expressions** page displays.

[Records](#) [Query](#) [Expressions](#) [Prompts](#) [Fields](#) [Criteria](#) [Having](#) [View SQL](#) [Run](#)

Query Name: New Unsaved Query **Description:**

No expressions have been defined yet.

[Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#)

23. Click on . The **Edit Expression Properties** page displays.

Edit Expression Properties

*Expression Type: Length:

☐ Aggregate Function Decimals:

Expression Text:

(A.BUD_AMOUNT_BOR*A.BUD_PERCENT_RATE)/100

[Add Prompt](#) [Add Field](#)

24. Select **Number** as the **Expression Type**.
25. Enter **6** in the **Length** field.
26. Enter **2** in the **Decimals** field.
27. Click on the [Add Field](#) link. The **Select a field** page displays.
28. Click on the [A.BUD_AMOUNT_BOR – Current Amount](#) link. This brings you back to the **Edit Expression Properties** page. **A.BUD_AMOUNT_BOR** now appears in the **Expression Text** field.
29. Add a * after the **A.BUD_AMOUNT_BOR** expression.
30. Click on the [Add Field](#) link. The **Select a field** page displays.
31. Click on the [A.BUD_PERCENT_RATE – Percent](#) link. This brings you back to the **Edit Expression Properties** page. **A.BUD_PERCENT_RATE** now appears in the **Expression Text** field after **A.BUD_AMOUNT_BOR***: **A.BUD_AMOUNT_BOR* A.BUD_PERCENT_RATE**.
32. Put parentheses around the **A.BUD_AMOUNT_BOR* A.BUD_PERCENT_RATE** expression: **(A.BUD_AMOUNT_BOR* A.BUD_PERCENT_RATE)**.
33. Add **/100** after the **(A.BUD_AMOUNT_BOR* A.BUD_PERCENT_RATE)** expression: **(A.BUD_AMOUNT_BOR* A.BUD_PERCENT_RATE)/100**.
34. Click on . This brings you back to the **Expressions** page.

[Records](#) [Query](#) [Expressions](#) [Prompts](#) [Fields](#) [Criteria](#) [Having](#) [View SQL](#) [Run](#)

Query Name: New Unsaved Query Description:

[Add Expression](#)

Expressions List				Customize	Find	First	1 of 1	Last
Expression Text	Use as Field	Add Criteria	Edit	Delete				
(A.BUD_AMOUNT_BOR*A.BUD_PERCENT_RATE)/100	Use as Field		Edit	Delete				

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

35. Click on the [Use as Field](#) link. The **Fields** page displays.

[Records](#) [Query](#) [Expressions](#) [Prompts](#) [Fields](#) [Criteria](#) [Having](#) [View SQL](#) [Run](#)

Query Name: New Unsaved Query Description:

View field properties, or use field as criteria in query statement. [Reorder / Sort](#)

Fields										Customize	Find	View All	First	1-8 of 8	Last
Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete						
1	A.SETID - SetID	Char5				SetID		Edit	Delete						
2	A.POSITION_NBR - Position Number	Char8				Position		Edit	Delete						
3	A.EMPLID - EmplID	Char11				ID		Edit	Delete						
4	A.DEPTID - Department	Char10				Dept		Edit	Delete						
5	A.BUD_AMOUNT_BOR - Current Amount	SNm17.2				Current Amount		Edit	Delete						
6	A.BUD_PERCENT_RATE - Percent	SNm10.2				PerRate		Edit	Delete						
7	A.BUD_HRAMT_BOR - Proposed Salary	SNm17.2				Proposed Salary		Edit	Delete						
8	(A.BUD_AMOUNT_BOR*A.BUD_PERCENT_RATE)/100	Num4.2				(A.BUD_AMOUNT_BOR*A.BUD_PERCEN		Edit	Delete						

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

36. Click on [Edit](#) for the (A.BUD_AMOUNT_BOR* A.BUD_PERCENT_RATE)/100 field. The **Edit Field Properties** page displays.

Edit Field Properties

Field Name: (A.BUD_AMOUNT_BOR*A.BUD_PERCENT_RATE)/100

Heading	Aggregate
<input type="radio"/> No Heading <input type="radio"/> RFT Short <input checked="" type="radio"/> Text <input type="radio"/> RFT Long Heading Text: <input type="text" value="Merit Amount"/> *Unique Field Name: <input type="text" value="EXPR8_8"/>	<input checked="" type="radio"/> None <input type="radio"/> Sum <input type="radio"/> Count <input type="radio"/> Min <input type="radio"/> Max <input type="radio"/> Average

[OK](#) [Cancel](#)

37. Verify the **Text** radio button is selected in the **Heading** group box.

38. Change the **Heading Text** field to **Merit Amount**.

39. Click on **OK**. This brings you back to the **Fields** page.

Records Query Expressions Prompts **Fields** Criteria Having View SQL Run

Query Name: New Unsaved Query Description:

View field properties, or use field as criteria in query statement. **Reorder / Sort**

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.SETID - SetID	Char5				SetID		Edit	-
2	A.POSITION_NBR - Position Number	Char8				Position		Edit	-
3	A.EMPLID - EmplID	Char11				ID		Edit	-
4	A.DEPTID - Department	Char10				Dept		Edit	-
5	A.BUD_AMOUNT_BOR - Current Amount	SNm17.2				Current Amount		Edit	-
6	A.BUD_PERCENT_RATE - Percent	SNm10.2				PerRate		Edit	-
7	A.BUD_HRAMT_BOR - Proposed Salary	SNm17.2				Proposed Salary		Edit	-
8	(A.BUD_AMOUNT_BOR*A.BUD_PERCENT_RATE)/100	Num4.2				Merit Amount		Edit	-

Save
 [Save As](#)
[New Query](#)
[Preferences](#)
[Properties](#)
[New Union](#)
[Return to Search](#)

40. Click on the **View SQL** tab. The **View SQL** page displays.

Records Query Expressions Prompts Fields Criteria Having **View SQL** Run

Query Name: New Unsaved Query Description:

Query SQL:

```

SELECT A.SETID, A.POSITION_NBR, A.EMPLID, A.DEPTID, A.BUD_AMOUNT_BOR, A.BUD_PERCENT_RATE, A.BUD_HRAMT_BOR, (
A.BUD_AMOUNT_BOR* A.BUD_PERCENT_RATE)/100
FROM PS_BUD_PSB_BOR A
WHERE A.BUD_VERSION_BOR = 'CURRENT'
AND A.BUDGET_PERIOD = :1
  
```

41. Click on the **Run** tab. A new page displays to enter the Prompt.

Budget Period:

42. Enter the appropriate **Budget Period**.

43. Click on **OK**. The query runs and returns the Merit Amounts by Position.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
Budget Period = 2008								
View All Rerun Query Download to Excel			First <input type="text" value="1"/> 1-100 of 2533 <input type="text" value="Last"/>					
	SetID	Position	ID	Dept	Current Amount	PerRate	Proposed Salary	Merit Amount
1		00001210	001537	5072110	26790.40	2.56	27476.80	685.83
2		00000554	LUMPSM	5072110	460.00	3082.61	14640.00	14180.00
3		00001213	009527	5072110	10000.00	2.50	102500.00	2500.00
4		00002092	006916	5073110	40000.00	2.50	41000.00	1000.00
5		00001218	LUMPSM	5073110	42271.00	0.00	42271.00	0.00
6		00001225	002357	5073110	55533.00	5.00	58310.00	2776.65
7		00001223	001886	5073110	42511.00	2.50	43574.00	1062.77
8		00002276	003783	5073110	30000.00	2.50	30750.00	750.00
9		00000969	000390	1061000	56947.72	2.72	58497.72	1548.97
10		00000971	003434	1061000	31981.94	3.44	33081.94	1100.17
11		00000965	002916	1061000	28059.20	4.97	29452.80	1394.54
12		00000967	002557	1061000	114609.75	-9.07	104218.14	-10395.00
13		00001115	005976	5011102	23600.00	1.50	23955.00	354.00
14		00001315	003502	5011116	26205.00	3.50	27123.00	917.17
15		00002534	LUMPSM	5011103	0.00	0.00	0.00	0.00
16		00001854	001372	5011122	27625.00	3.50	28592.00	966.87
17		00001153	003873	5011105	24674.00	1.50	25044.00	370.11
18		00002103	009006	5011113	25600.00	2.00	26113.00	512.00
19		00001150	LUMPSM	5011116	70880.00	14.59	81220.28	10341.30
20		00002448	008578	5011118	21112.00	2.07	21548.80	437.01

If you want to include the Account Code information in your query results, you will have to add a new Record and Criteria to this query.

44. Click on the **Records** tab. The **Records** page displays.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
Query Name: New Unsaved Query		Description:						
Find an Existing Record								
*Search By:		Record Name	begins with	BUD_PSC_BOR				
<input type="button" value="Search"/>		Advanced Search						
Search Results								
Record		Customize Find View All		First <input type="text" value="1"/> of 1 <input type="text" value="Last"/>				
Recname		Join Record		Show Fields				
BUD_PSC_BOR - BOR Budgets PS Dist		Join Record		Show Fields				
<input type="button" value="Save"/>		Save As		New Query		Preferences		Properties
				New Union		<input type="button" value="Return to Search"/>		

45. Enter **BUD_PSC_BOR** in the **Search By Record Name** field.

46. Click on . The **Search Results Record** list displays.

47. Click on the [Join Record](#) link for the **BUD_PSC_BOR** record. The **Select join type...** page displays.

Select join type and then record to join with BUD_PSC_BOR - BOR Budgets PS Dist.

Join Type

☒ Join to filter and get additional fields (Standard Join)
☐ Join to get additional fields only (Left outer join)

Join Record

Customize | Find |
First 1 of 1 Last

A = BUD_PSB_BOR - BOR Budgets PS

Cancel

48. Verify that the **Standard Join** radio button is selected in the **Join Type** group box.

49. Click on the [A = BUD_PSB_BOR](#) link. The **Auto Join Criteria** page displays.

Auto Join Criteria

Query has detected the join conditions shown below.

Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

☒ A.SETID - SetID = B.SETID - SetID
☒ A.BUD_TYPE_BOR - BOR Budget Type = B.BUD_TYPE_BOR - BOR Budget Type
☒ A.BUDGET_PERIOD - Budget Period = B.BUDGET_PERIOD - Budget Period
☒ A.BUD_VERSION_BOR - Version for BOR = B.BUD_VERSION_BOR - Version for BOR
☒ A.POSITION_NBR - Position Number = B.POSITION_NBR - Position Number
☒ A.POSITION_POOL_ID - Position Pool ID = B.POSITION_POOL_ID - Position Pool ID
☒ A.EMPLID - EmplID = B.EMPLID - EmplID
☒ A.EMPL_RCD - Empl Rcd Nbr = B.EMPL_RCD - Empl Rcd Nbr

Add Criteria
Cancel

50. Click on [Add Criteria](#). The following dialog box displays:

Windows Internet Explorer

An effective date criteria has been automatically added for this effective dated record. (139,60)

OK

51. Click on [OK](#). The **Query** page displays.

Chosen Records

Alias Record

☐ A BUD_PSB_BOR - BOR Budgets PS [Hierarchy Join](#)

☒ B BUD_PSC_BOR - BOR Budgets PS Dist [Hierarchy Join](#)

Fields Find | View All First 1-22 of 22 Last

<input type="checkbox"/>	SETID - SetID	Join SETID_TBL - TableSet IDs	
<input type="checkbox"/>	BUD_TYPE_BOR - BOR Budget Type		
<input type="checkbox"/>	BUDGET_PERIOD - Budget Period		
<input type="checkbox"/>	BUD_VERSION_BOR - Version for BOR		
<input type="checkbox"/>	POSITION_NBR - Position Number		
<input type="checkbox"/>	POSITION_POOL_ID - Position Pool ID		
<input type="checkbox"/>	EMPLID - EmplID		
<input type="checkbox"/>	EMPL_RCD - Empl Rcd Nbr		
<input type="checkbox"/>	ERNCD - Earnings Code	Join BUD_EARNVW_BOR - Departments	
<input checked="" type="checkbox"/>	ACCT_CD - Account Code	Join BUD_ACCT_VW_BOR - Account Codes	

52. Select the **ACCT_CD** field for the **BUD_PSC_BOR** record.

53. Click on the **Criteria** tab. The **Criteria** page displays.

[Records](#) [Query](#) [Expressions](#) [Prompts](#) [Fields](#) **Criteria** [Having](#) [View SQL](#) [Run](#)

Query Name: New Unsaved Query Description:

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="button" value="AND"/>	ABUD_VERSION_BOR - Version for BOR	equal to	CURRENT	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	ABUDGET_PERIOD - Budget Period	equal to	:1	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	A.SETID - SetID	equal to	B.SETID - SetID	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	ABUD_TYPE_BOR - BOR Budget Type	equal to	B.BUD_TYPE_BOR - BOR Budget Type	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	ABUDGET_PERIOD - Budget Period	equal to	B.BUDGET_PERIOD - Budget Period	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	ABUD_VERSION_BOR - Version for BOR	equal to	B.BUD_VERSION_BOR - Version for BOR	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	A.POSITION_NBR - Position Number	equal to	B.POSITION_NBR - Position Number	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	A.POSITION_POOL_ID - Position Pool ID	equal to	B.POSITION_POOL_ID - Position Pool ID	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	A.EMPLID - EmplID	equal to	B.EMPLID - EmplID	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	A.EMPL_RCD - Empl Rcd Nbr	equal to	B.EMPL_RCD - Empl Rcd Nbr	<input type="button" value="Edit"/>	<input type="button" value="-"/>
<input type="button" value="AND"/>	B.EFFDT - Effective Date	Eff Date <=	Current Date	<input type="button" value="Edit"/>	<input type="button" value="-"/>

[Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#)

54. Click on the to delete the **B.EFFDT – Effective Date** criteria.

[Records](#)
[Query](#)
[Expressions](#)
[Prompts](#)
[Fields](#)
[Criteria](#)
[Having](#)
[View SQL](#)
[Run](#)

Query Name: New Unsaved Query Description:

[Add Criteria](#) [Group Criteria](#) [Reorder Criteria](#)

Criteria	Logical	Expression1	Condition Type	Expression 2	Edit	Delete
		A.BUD_VERSION_BOR - Version for BOR	equal to	CURRENT	Edit	-
AND		A.BUDGET_PERIOD - Budget Period	equal to	:1	Edit	-
AND		A.SETID - SetID	equal to	B.SETID - SetID	Edit	-
AND		A.BUD_TYPE_BOR - BOR Budget Type	equal to	B.BUD_TYPE_BOR - BOR Budget Type	Edit	-
AND		A.BUDGET_PERIOD - Budget Period	equal to	B.BUDGET_PERIOD - Budget Period	Edit	-
AND		A.BUD_VERSION_BOR - Version for BOR	equal to	B.BUD_VERSION_BOR - Version for BOR	Edit	-
AND		A.POSITION_NBR - Position Number	equal to	B.POSITION_NBR - Position Number	Edit	-
AND		A.POSITION_POOL_ID - Position Pool ID	equal to	B.POSITION_POOL_ID - Position Pool ID	Edit	-
AND		A.EMPLID - EmplID	equal to	B.EMPLID - EmplID	Edit	-
AND		A.EMPL_RCD - Empl Rcd Nbr	equal to	B.EMPL_RCD - Empl Rcd Nbr	Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

55. Click on the **Run** tab. A new page displays to enter the Prompt.

Budget Period:

[OK](#) [Cancel](#)

56. Enter the appropriate **Budget Period**.

57. Click on [OK](#). The query runs and returns the Merit Amounts by Position and Account Code.

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Budget Period = 2008

[View All](#) | [Rerun Query](#) | [Download to Excel](#)

First 1-100 of 2690 Last

	SetID	Position	ID	Dept	Current Amount	PerRate	Proposed Salary	Merit Amount	Acct Code
1		00000001	007857	1022101	24980.80	2.00	25480.00	499.61	102210110000522100001
2		00000002	LUMPSM	1001104	1200.00	0.00	1200.00	0.00	100110410000524100001
3		00000003	LUMPSM	1015000	0.00	0.00	0.00	0.00	101500010000523120001
4		00000004	LUMPSM	1001104	0.00	0.00	0.00	0.00	100110410000525100001
5		00000005	003893	1001104	49294.70	2.84	50694.67	1399.96	100110410500511100001
6		00000006	000261	1001104	51052.20	2.74	52452.20	1398.83	100110410500511100001
7		00000007	000029	1001104	60570.00	2.48	62070.00	1502.13	100110410500511100001
8		00000008	009099	1005107	38000.00	2.63	39000.00	999.40	100510710500511100001
9		00000009	002965	1001104	65110.60	-5.30	61660.55	-3450.80	100110410500511100001
10		00000010	003911	1001104	49970.00	2.60	53269.98	1299.22	100110410000511100001
11		00000011	009076	1001104	51000.00	17.65	60000.00	9001.50	100110410000511100001
12		00000012	008202	1001104	51500.00	2.43	52750.00	1251.45	100110410000511100001
13		00000013	007970	1001104	44500.00	2.92	45800.00	1299.40	100110410000511100001
14		00000014	009078	1005119	39000.00	2.81	40095.00	1095.90	100511910000511100001
15		00000015	VACANT	1001104	0.00	0.00	0.00	0.00	100110410000511100001
16		00000016	LUMPSM	1013110	0.00	0.00	0.00	0.00	101311010000525100001
17		00000017	005035	1033000	16473.60	33.33	21964.80	5490.65	103300020000522100007
18		00000018	001041	1001107	36286.46	2.50	37193.62	907.16	100110710500521100001
19		00000019	LUMPSM	1001107	4300.00	0.00	4300.00	0.00	100110710000524100001
20		00000020	LUMPSM	1013317	0.00	0.00	0.00	0.00	101331710000524100001

58. Click on the **Fields** tab. The **Fields** page displays.

59. Click on  **Save**. The **Enter a name to save this query** page displays.

Enter a name to save this query:

*Query:

Description:

Folder:

*Query Type: ▼

*Owner: ▼


Query Definition:

60. Enter **BUD_PREP_MERIT_AMOUNT** or another appropriate **Query** name.

61. Enter **Merit Amount** or another appropriate **Description**.

62. Select **Public** as the **Owner**.

63. Enter an appropriate **Query Definition**.

64. Click on .

ADDITIONAL OIIT RESOURCES and SUPPORT: Contact the **OIIT HELPDESK** at http://www.usg.edu/customer_services (support request self-service) or e-mail helpdesk@usg.edu. For emergency, business interruptions, or production down situations, call the **OIIT HELPDESK** immediately (706-583-2001; or toll free within Georgia 1-888-875-3697).

KEY RECORDS FOR BUDGET PREP QUERIES in GeorgiaFIRST PeopleSoft Financials Version 8.9

The following is a list of all Key Records that you can use for your Budget Prep queries.

Personal Services

Use the following records for queries on Personal Services:

1. BUD_PSA_BOR
2. ***BUD_PSB_BOR
3. BUD_PSC_BOR
4. * BUD_PSD_BOR
 - **Note:** This record is new and is used for Position Pool changes.

Non Personal Services

Use the following records for queries on Non Personal Services:

1. BUD_NPSA_BOR
 - **Note:** This record is used for Appropriation, Revenue Estimate, and Grants budgets.
2. BUD_NPSB_BOR
 - **Note:** This record is used for Organization budgets.

Build Financials Process

The Build Financials process populates the following records:

1. BUD_AGGDET_BOR
2. BUD_JRNLBLD_BOR

Budget Prep Schedule Reports

All the Budget Prep Schedule reports use the BUD_AGGDET_BOR record.

Revenue/Estimate Report

The Revenue/Estimate report uses the BUD_JRNLBLD_BOR record.

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