

BP.030.004 - DEPARTMENT BUDGET REVIEW/UPDATE

Purpose	<ul style="list-style-type: none">• To review budget, encumbrance, and expense data by ChartField department• To update budget for positions funded in the selected ChartField department.
Description	The Department Budget page allows users to review all budget, encumbrance, expense, and salary distribution data for all positions within a funding department and to create budget journals to adjust ChartFields referenced on the page.
Security Role	BOR_PB_UPDATE
Dependencies/ Constraints	<ul style="list-style-type: none">• Initial setup and refresh were completed.• Budget data requires budget journals to include Position Number detail in the Ref field.
Additional Information	None

Procedure

Below are complete step-by-step instructions on using the Department Budget page to review or adjust position budgets.

Step	Action
1.	Click the NavBar to navigate.
2.	Click the Menu icon.
3.	Click the BOR Menus link.
4.	Click the BOR Position Budget Mgmt link.
5.	Click the Position Budget Update link.
6.	Click the Department Budget link.
7.	Enter Business Unit and any criteria for the ChartField Department ID .
8.	Click the Search button.
9.	If the search criteria is specific to only one department, the Department Budget page opens. Otherwise, select the desired department from the list of search results.
10.	Click the View All link for the Positions section and the Account Distribution sections to show position data entries.
11.	Click the View All link for the ChartField Summary section and the Account Distribution sections to show data summarized by unique ChartField.
12.	To adjust position budgets, enter a new or select an existing Journal ID from the Journal ID field.
13.	Enter the Date , Fiscal Year , and Period for the journal if creating a new Journal ID. If editing an existing journal, these fields populate from the existing Journal ID.
14.	Enter adjustments in the Budget Adjust field for rows being adjusted.
15.	Click the Save button. The Apply button should no longer be greyed out.
16.	<p>Click the Apply button. The system navigates back to the Search Criteria page and displays a message with the Journal ID and a count of rows created for each journal created or edited.</p> <ul style="list-style-type: none"> Any ORG journals created use the Journal ID as entered Any APPROP journals created have the fourth character of the Journal ID replaced with the character "A" <p>Note: For the APPROP Only Ledger Option – APPROP journals use the Journal ID as entered</p> <ul style="list-style-type: none"> Any PROJ_GRT journals created have the fourth character of the Journal ID replaced with the character "P"

Step	Action
17.	<p>Users can adjust the journal header and rows as needed through the Enter Budget Journals page.</p> <p>For more information, see KK.020.001 – Entering and Maintaining Appropriation Budget, KK.020.003 – Entering and Maintaining Organization Budgets, KK.020.005 – Entering and Maintaining Grant Budgets.</p>