

KK.020.014 - COPYING BUDGET JOURNALS

Purpose	<ul style="list-style-type: none"> • To copy budget journals. • To search for existing budget journals. • To identify required fields in the Budget Journal Copy page.
Description	<p>This topic demonstrates how to copy previously created budget journals. Commitment Control allows users to copy posted, unposted, edited and error journals online through the journal entry page. When the copy process finishes successfully, the Commitment Control Journal Entry page is refreshed and is loaded with the newly copied journal.</p>
Security Role	BOR_KK_BUDGET_ENTRY
Dependencies/Constraints	<p>The copying of budget journals across different Commitment Control Ledger Groups is not supported.</p>
Additional Information	<p>ChartFields and amounts can be modified on the copied journal as needed.</p>

Procedure

Below are step by step instructions are how to copy budget journals.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the Commitment Control link.
4.	Click the Budget Journals link.
5.	Click the Enter Budget Journals link.
6.	Click the Find an Existing Value tab.
7.	Enter Search Criteria for Journal Date and Budget Header Status .
8.	Click the Search button. The system returns results for all budget journals based on criteria set above.
9.	Click an entry in the Journal ID column.
10.	Click the Budget Lines tab.
11.	Click in the Process drop-down menu.
12.	Select Copy Journal .
13.	Click the Process button.
14.	<p>Verify default values populate or enter New Journal ID and New Journal Date fields.</p> <ul style="list-style-type: none"> • New Journal ID: Enter a journal ID for the new budget journal. The default is NEXT, which means the system automatically assigns the next available journal ID number as determined by the installation setup. This field is unavailable and locked to the value NEXT if users select the Use Next Journal ID value. • New Journal Date: Users enter a new date for the journal they are creating. The system uses Business Unit, New Journal ID and New Journal Date to check for the creation of duplicate journal, and prevents duplicates by issuing an error message.
15.	Click the Budget Entry Type drop-down menu.

Step	Action
16.	<p>Users can choose from three Budget Entry Types:</p> <ul style="list-style-type: none"> • Original - Select Original if this is an original budget entry being made for the first time • Adjustment - Select Adjustment if this is an adjustment to an original budget amount. • Permanent Adjustment - Select Permanent Adjustment if this is an adjustment to an original budget amount and needs to be carried forward. <p><i>Note: Only Original and Permanent Adjustment budget journals are included in the next appropriation year's budget within the Budget Prep module.</i></p>
17.	<p>Enter the Parent Budget Entry Type for the new journal, if users elected to generate parent budgets on the source budget journal. The value defaults to the same value as the source journal but users can change it to Original, Permanent Adjustment or Adjustment for the new journal.</p> <p><i>Note: Parent budget entry types are only valid when copying ORG or PROJ_GRT budget journals.</i></p>
18.	Click the OK button.
19.	Click the Save button.