

## GL.020.041 - UPDATE ALLOCATION STEP

<b>Purpose</b>	To update an Allocation Step for the next fiscal year.
<b>Description</b>	This topic demonstrates how to update the Budget Reference year in an allocation step. At the end of each year, some allocation steps require users to update the budget reference field. The following business process walks users through this process.
<b>Security Role</b>	BOR_GL_PERF_ALLOC_PRC
<b>Assumptions</b>	None
<b>Dependencies/ Constraints</b>	None
<b>Additional Information</b>	At fiscal year-end, check to see if any allocations need to be updated for the next fiscal year.

## **Procedure**

Below are step by step instructions are how to update the Budget Reference year in an allocation step.

<b>Step</b>	<b>Action</b>
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Navigator</b> icon.
3.	Click the <b>Allocations</b> link.
4.	Click the <b>Define and Perform Allocations</b> link.
5.	Click the <b>Define Allocation Step</b> link.
6.	Enter an allocation step in the <b>Allocation Step</b> field.
7.	Click the <b>Search</b> button.
8.	Select the corresponding allocation step from the search results. The system navigates to the Define Allocation Step page.
9.	Click the <b>Target</b> tab.
10.	Enter a Budget Reference Value in the <b>Budget Reference Value</b> field.
11.	Click the <b>Offset</b> tab.
12.	Enter a Budget Reference in the <b>Budget Reference</b> field.
13.	Click the <b>Save</b> button.