

EP.080.070 – UPDATING BUD REF FOR ALL REQUESTERS AT YEAR-END

Purpose	To update the BUD REF for all Requesters at Year-End.
Description	<p>The BUD REF determines to what budget year the PREENC is charged. At the beginning of each fiscal year, institutions need to update the default Budget Reference (BUD REF) for all Requesters within their Business Unit to ensure requisitions are created for and charged to the correct budget year.</p> <p>The Update Requester Budget Ref process automates this BUD REF update. Once ePro Administrators run this process, the BUD REF field populates with the new BUD REF default value for all Requester profiles.</p>
Security Role	BOR_PO_SETUP_CONFIG
Assumptions	None
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to update the BUD REF for all Requesters using the Update Requester Budget Ref process.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the BOR Menus link.
4.	Click the BOR Purchasing link.
5.	Click the BOR PO Use and Processing link.
6.	Click the Update Requestor Budget Ref link.
7.	Click the Add a New Value tab.
8.	Enter the Run Control ID .
9.	Verify the Business Unit populates correctly.
10.	Enter the Budget Reference with the new fiscal year.
11.	Click the Save button.
12.	Click the Run button.
13.	Click the OK button.
14.	Click the Process Monitor link.
15.	Verify the process runs to Success. The BUD REF for all Requesters now reflects the BUD REF defined on the Run Control page.