

BP.010.012 – IMPORTING FIN DATA

Purpose	To import original and permanent budget journal information into the Budget Prep system.
Description	The Financials Import process populates Budget Prep tables with non-personal services data from Original and Permanent Budget Journals for the prior fiscal years. Users have the option to rerun the process for all or a range of departments.
Security Role	BOR_BP_PROCESSES
Dependencies/ Constraints	User completed all Budget Prep Setup steps.
Additional Information	None

Procedure

Below are complete step-by-step instructions on completing the Financials Import for Budget Prep Processing.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the BOR Menus link.
4.	Click the BOR Budget Prep link.
5.	Click the Budget Prep Processing link.
6.	Click the Financials Import link.
7.	The Run Control ID page opens. Add a new value or use an existing Run Control ID .
8.	Select either the Create Report or Create Report/Run FIN Import option. <i>Note: if users select the Create Report/Run FIN Import this option both creates the report and updates the database.</i>
9.	Enter the appropriate Business Unit in the Business Unit field.
10.	Select All Departments or pick a range of departments to import using the From Department and To Department fields. <i>Note: users should select All Departments the first time this process runs. The From Department and To Department range can be used if data needs to be updated or re-imported for any reason.</i>
11.	Click the Run button. The Process Scheduler Request page opens.
12.	Verify default values pre-populate.
13.	Click the OK button. The system navigates to the Fin Import page.
14.	Click the Process Monitor link.
15.	Click the Refresh button. Select Refresh until the Run Status displays as 'Success' and the Distribution Status displays as 'Posted.'
16.	Click the Details link to view the Process Detail.
17.	Click the View Log/Trace link.