

BP.010.025 – ADDING NEW NON-PERSONAL SERVICES BUDGETS

Purpose	To add new Travel, Operating, and Equipment budgets for the next fiscal year.
Description	The Non-Personal Services data update page allows users to create budget lines for operating expenses. Budgets can also be created for Personal Services accounts that are not tied to any specific position. Any new Non-Personal Services lines will be included in the new year's budget and in original budget journals.
Security Role	BOR_BP_UPDATES
Dependencies/ Constraints	<ul style="list-style-type: none"> • User completed all Budget Prep Setup steps. • User ran the HCM Import process in Create Report/Run HCM Import mode. • ChartField combination does not already exist in Budget Prep data.
Additional Information	None

Procedure

Below are complete step-by-step instructions on adding new Non-Personal Services budgets using the Non-Personal Services page in Budget Prep Data Update.

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 Data Update link.
6.	Click the Non-Personal Services link.
7.	Click the Add a New Value tab.
8.	Enter the appropriate Business Unit in the Business Unit field.
9.	Enter the Budget Reference for the upcoming budget year in the Budget Reference field.
10.	Enter an Account number in the Account field. <i>Note: The account number will typically be for an APPROP level account such as 500000, 600000, 700000, or 800000.</i>
11.	Enter a Fund number in the Fund Code field. <i>Note: Funds between 20000 and 29999 should not be selectable. Budgets for those funds are added or updated through the Grants data update page.</i>
12.	Enter a Department ID in the Department field.
13.	Enter a Program number in the Program Code field
14.	Enter a Class number in the Class Field .
15.	Enter a Project ID in the Project field if appropriate. <i>Note: The Project ID entered should be for a PPV project or non-Grant project.</i>
16.	Click the Add button. The system navigates to the Update Non-Personal Services page.
17.	Verify date in the Date field is July 1 of the fiscal year in development.
18.	Enter an amount in the Proposed Budget field.
19.	If needed, enter notes in the Comments field if necessary.
20.	If needed, add entries in the Organization Level section.
21.	Enter an ORG level Account number in the Account field.

Step	Action
22.	Enter an amount in the Proposed Budget field. The total of all Organizational Level budgets must equal zero or equal the Proposed Budget at the Appropriation Level.
23.	Add additional Organizational Level rows by clicking the plus (+) button at the right side of the current row.
24.	Click the Save button.