

BP.030.003 - POSITION BUDGET REVIEW/UPDATE

Purpose	<ul style="list-style-type: none"> To review budget, encumbrance, and expense data by position. To update budget for a specific position.
Description	The Position Budget page allows users to review budget, encumbrance, expense, and salary distribution data for a single position and to create budget journals to adjust ChartFields referenced on the page.
Security Role	BOR_PB_UPDATE
Dependencies/ Constraints	<ul style="list-style-type: none"> Initial setup and refresh completed. Budget data requires budget journals include Position Number detail in the Ref field.
Additional Information	None

Procedure

Below are complete step-by-step instructions on using the Position Budget page to review or adjust position budgets.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the BOR Menus link.
4.	Click the BOR Position Budget Mgmt link.
5.	Click the Position Budget Update link.
6.	Click the Position Budget link.
7.	Enter any criteria for search in the Search Criteria section.
8.	Click the Search button.
9.	If the search criteria is specific to only one position, the Position Budget page opens. Otherwise, select the desired position from the list of search results.
10.	Click the View All link for the Position ChartField Budgets section and the Account Distribution sections to show all entries.
11.	To adjust position budgets, enter a new or select an existing Journal ID from the Journal ID field.
12.	Enter the Date , Fiscal Year , and Period for the journal if creating a new Journal ID. If editing an existing journal, these fields populate from the existing Journal ID.
13.	Navigate to the Account Distribution section and enter adjustments in the Budget Adjust field for rows being adjusted.
14.	Click the Save button. The Apply button should no longer be greyed out.

Step	Action
15.	<p>Click the Apply button. The system navigates back to the Search Criteria page and displays a message with Journal ID and a count of rows created for each journal created or edited.</p> <ul style="list-style-type: none"> • Any ORG journals created use the Journal ID as entered • Any APPROP journals created have the fourth character of the Journal ID replaced with the character “A” <p><i>Note: For the APPROP Only Ledger Option – APPROP journals will use the Journal ID as entered</i></p> <ul style="list-style-type: none"> • Any PROJ_GRT journals created have the fourth character of the Journal ID replaced with the character “P”
16.	<p>Users can adjust the journal header and rows as needed through the Enter Budget Journals page.</p> <p>For more information, see KK.020.001 – Entering and Maintaining Appropriation Budget, KK.020.003 – Entering and Maintaining Organization Budgets, KK.020.005 – Entering and Maintaining Grant Budgets.</p>