KK.010.002 - MAINTAINING BUDGET ATTRIBUTES

Purpose	• To identify the valid Ledger Group values for Budget Attributes. • To modify a Budget Attribute by Budget Reference. • To modify a Budget Attribute by Budget Status.
Description	This topic demonstrates the steps required to modify an existing Budget Attribute. The Budget Attributes component can be used to refine budget processing options for a specific Business Unit and ChartField combination. Budget Attributes are useful when users want to override the options selected at a higher level (Budget Definition). Conversely, any budget whose attributes users do not configure through the Budget Attributes page inherits its attributes from a higher level (Budget Definition).
Security Role	**BOR_KK_SETUP**
Dependencies/ Constraints	None
Additional Information	

Procedures

Below are step by step instructions are how to edit the Budget Status of an existing Budget Attribute.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Commitment Control** link.
4.	Click the **Define Control Budgets** link.
5.	Click the **Budget Attributes** link.
6.	Budget Attributes are useful when users want to override options selected at a higher level. Enter a specific ledger group in the **Ledger Group** field for which to establish budget attributes. Valid values include: APPROP, ORG, PROJ_GRT, PRMST_EX, PRMST_REV and REVEST.
7.	Click the **Search** button. The system navigates to the **Commitment Control Budget Attributes** page.
8.	To define budget attributes, enter the budget ChartField combinations beginning with an Account number in the **Account** field.
9.	Enter a Fund in the **Fund** field.
10.	Enter a Department number in the **Dept** field.
11.	Enter a Program number in the **Program** field.
12.	Enter a Class number in the **Class** field.
13.	Enter a Budget Reference in the **Bud Ref** field.
14.	Click the **Fetch** button.
15.	Click the **Set Options** link in the Set Options column for an entry to edit. The system generates the Set Options popup window.
16.	Click in the **Status** dropdown.
17.	For this business process, **Closed** is selected. ***Note****: By changing the budget period status to Closed, users are not able to budget check any transaction whose budget date falls within the budget period.*
18.	Click the **OK** button. The system navigates back to the Commitment Control Budget Attributes page.
19.	Click the **Save** button.

Below are step by step instructions are how to edit the Control Option for a specific ChartField combination as of a particular effective date.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **Commitment Control** link.
4.	Click the **Define Control Budgets** link.
5.	Click the **Budget Attributes** link.
6.	Budget Attributes are useful when users want to override options selected at a higher level. Enter a specific ledger group in the **Ledger Group** field for which to establish budget attributes. Valid values include: APPROP, ORG, PROJ_GRT, PRMST_EX, PRMST_REV and REVEST.
7.	Click the **Search** button. The system navigates to the **Commitment Control Budget Attributes** page.
8.	To define budget attributes, enter the budget ChartField combinations beginning with an Account number in the **Account** field.
9.	Enter a Fund in the **Fund** field.
10.	Enter a Department number in the **Dept** field.
11.	Enter a Program number in the **Program** field.
12.	Enter a Class number in the **Class** field.
13.	Specify the effective date for the budget attribute in the **Effective Date** field.

Step	Action
14.	Select the control option. In this example, the ChartField combination is set to **Track with Budget**. This requires a budget exists, but does not prevent spending in the event expenditures exceed the budget. Click in the **Control Option** drop-down menu. Options are: • **Control**: Strictly control transactions against budgeted amounts. Error exceptions are logged when transactions exceed the budgeted amount. • **Track with Budget**: Track transaction amounts against a budget, but do not issue error exceptions unless no corresponding budget row exists. Pass if budget row exists, even for a zero amount, but issue warnings when transactions exceed the budgeted amount. • **Track without Budget**: Track transactions even if no budget setup exists. If a budget row does exist, warnings will be logged when transactions exceed the budgeted amount. If no budget row exists, no warning is issued.
15.	Click the **OK** button. The system navigates back to the Commitment Control Budget Attributes page.
16.	Click the **Save** button.