

## BP.030.003 - POSITION BUDGET REVIEW/UPDATE

<b>Purpose</b>	<ul style="list-style-type: none"> <li>To review budget, encumbrance, and expense data by position.</li> <li>To update budget for a specific position.</li> </ul>
<b>Description</b>	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.
<b>Security Role</b>	<b>BOR_PB_UPDATE</b>
<b>Dependencies/ Constraints</b>	<ul style="list-style-type: none"> <li>Initial setup and refresh completed.</li> <li>Budget data requires budget journals include Position Number detail in the Ref field.</li> </ul>
<b>Additional Information</b>	None

## **Procedure**

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

<b>Step</b>	<b>Action</b>
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> icon.
3.	Click the <b>BOR Menus</b> link.
4.	Click the <b>BOR Position Budget Mgmt</b> link.
5.	Click the <b>Position Budget Update</b> link.
6.	Click the <b>Position Budget</b> link.
7.	Enter any criteria for search in the <b>Search Criteria</b> section.
8.	Click the <b>Search</b> 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 <b>View All</b> 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 <b>Journal ID</b> field.
12.	Enter the <b>Date</b> , <b>Fiscal Year</b> , and <b>Period</b> 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 <b>Budget Adjust</b> field for rows being adjusted.
14.	Click the <b>Save</b> button. The Apply button should no longer be greyed out.

Step	Action
15.	<p>Click the <b>Apply</b> 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"> <li>• Any ORG journals created use the Journal ID as entered</li> <li>• Any APPROP journals created have the fourth character of the Journal ID replaced with the character “A”</li> </ul> <p><i><b>Note:</b> For the APPROP Only Ledger Option – APPROP journals will use the Journal ID as entered</i></p> <ul style="list-style-type: none"> <li>• Any PROJ_GRT journals created have the fourth character of the Journal ID replaced with the character “P”</li> </ul>
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>