



Introduction

When making and adjusting new expense budgets, the first thing you must verify is if the coding is correct.

Does it need to be a budget set up at the Unit or Group Level?

First, check the **Unit** table to find the **Group** rollup information. Usually, Units marked with Budgeting are typically set up at the Unit level. To verify, you'll need to go to the Budget Query (**BQ**) table. Check both the Unit and Group Level for the Expense budgets- checking the Unit level first. ***If you don't know if you have Group budgets, please inquire how you're structured.***

If you don't see any budgets at the Unit level, then it's likely a Group level budget.

Some departments set up multiple budgets using the same object code but with different Appropriation Units.

BQ31LV1 Appropriation Budget

BQ40LV1 Program Expense

BQ40LV2 Phase Expense

BQ44LV1 Expense Budget 44: Appropriation Level

BQ44LV2 Expense Budget 44: Group Level

BQ44LV3 Expense Budget 44: Unit Level

other queries include revenue budgets:

BQ45LV1 Revenue Budget 45: Appropriation Level

BQ45LV2 Revenue Budget 45: Group Level

BQ45LV3 Revenue Budget 45: Unit Level

BQ48LV1 Revenue Budget 48: Level 1

BQ48LV2 Revenue Budget 48: Level 2

Set up a new budget

For this example: Expense Unit budget needs to be set up for Fund 1000, Dept 150, Unit 0480, Appr Unit FHGAA, Object 6006, no dollar amount.

Setup a new budget

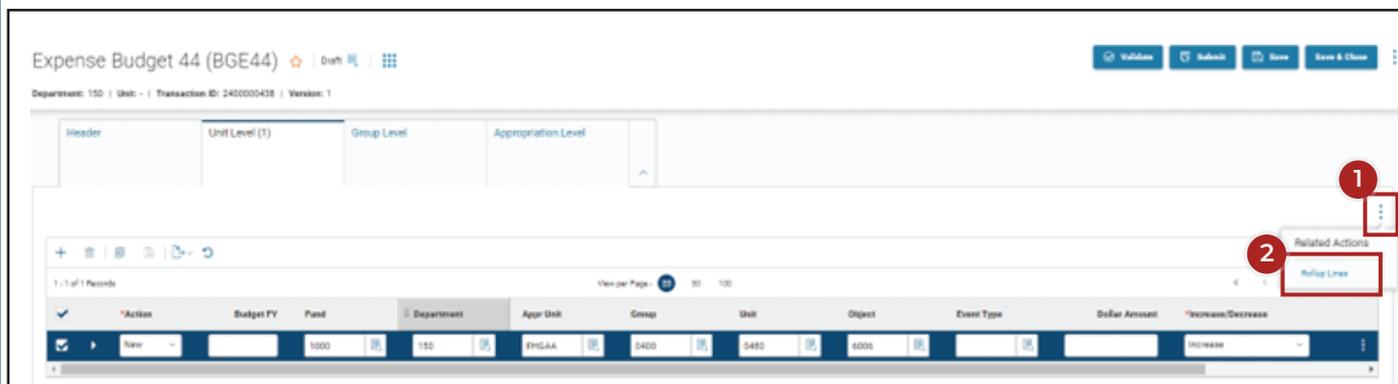
1. Go to Transaction Catalog and enter the following fields:
 - **Transaction Code:** BGE44
 - **Transaction Department:** 150
 - **Transaction ID:** 24

7. On the new line, enter the following:

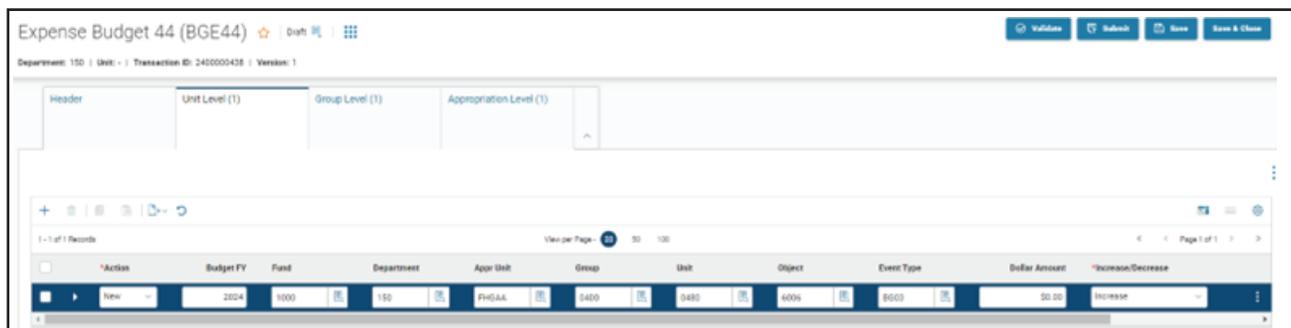
- **Fund**
- **Department**
- **Appr Unit**
- **Group**
- **Unit**
- **Object**

The Action is new and the **Event Type** will automatically display once the Roll up Lines option is used. If you don't roll up your budget lines, there will be issues completing the budget set up.

1. Select the box on the far left and click the **three-dot menu**  option on the far right.
2. Under **Related Actions**, select **Rollup Lines**.



Once completed, the budgets will be displayed in the **Group** Level and the **Appropriation** Level.

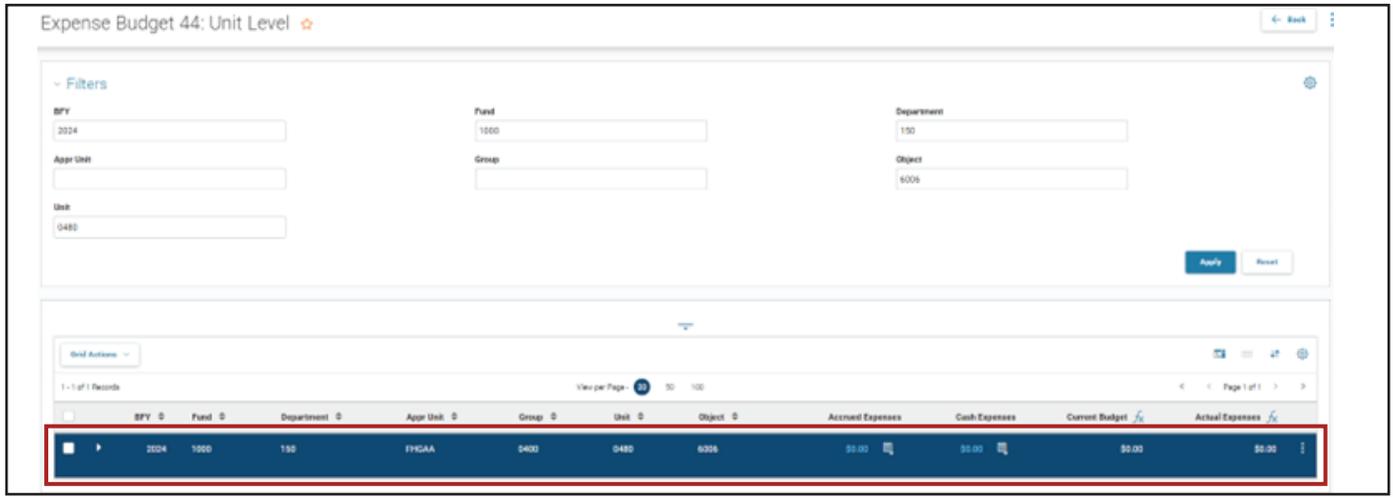


3. Click the **Validate** button at top right. A message displays 'Transaction validated successfully.'
4. Click the **Submit** button next to the Validate button. If message displays Transaction submitted successfully, you can close the BGE44.

You'll be brought back to the Create Transaction page again. Use the Cancel button to close this page, unless you're creating another budget.

You can create multiple lines in your BGE44 document.

Go to the BQ page again, and select the **Expense Budget 44: Unit Level**, enter information to see the new budget just created.



Reasons to activate, deactivate or delete a budget

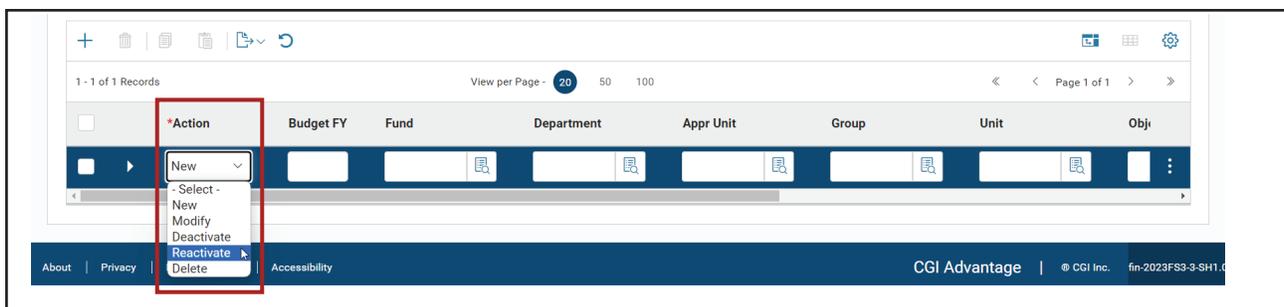
You may find your department sets up budgets at the Group Level. While researching, you find a Unit Level budget that was set up in error, and funds have applied to a (bad) Unit Level budget.

To correct this error, the first thing that must be done is to move the funds from the bad budget to another coding block. Once the funds have been successfully moved and no funds are displaying on this bad Unit Level budget, you must then **Deactivate** the bad Unit Level budget. Once that has been accomplished, **Delete** the bad Unit Level budget.

Activate a budget

Reactivating allows you to use the coding combination again. If you find an expense budget is not active and should be, you can Activate it by creating a BGE44 document. Create a new line, by selecting add line button (+). Enter budget information as needed.

- Select **Action:** Reactivate



- Select **Event Type:** BG09 (Activate Budget Line)

Enter the budget information needed, no Rollup Option is needed.

- Select **Validate**
- Select **Submit**

Deactivate a budget

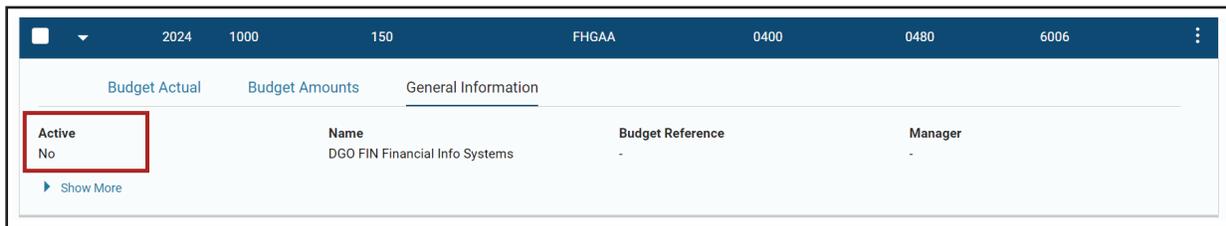
Deactivating leaves the funds, but turns off the coding combination. To deactivate an expense budget, create a BGE44 document.

- Select **Action:** Deactivate
- Select **Event Type:** BG08 (Deactivate Budget Line)

Enter budget information needed, no Rollup Option is needed.

- Select **Validate**
- Select **Submit**

The budget will still display. When you re-open it, it will now display as not active.



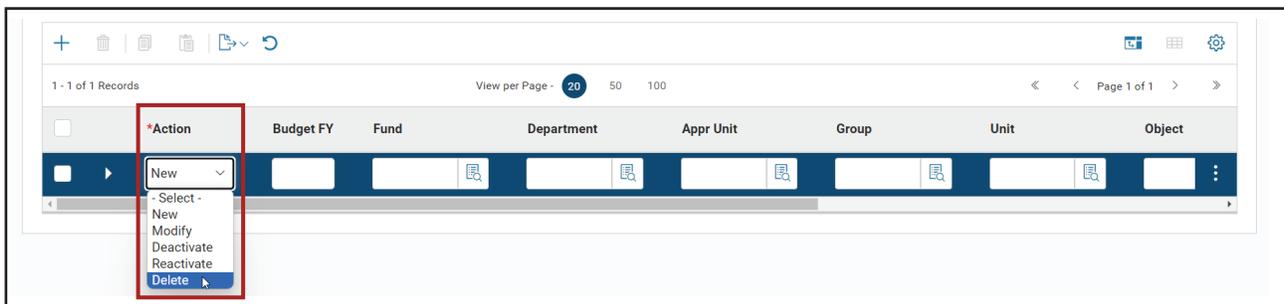
Budget Actual	Budget Amounts	General Information		
Active No	Name DGO FIN Financial Info Systems	Budget Reference -	Manager -	
Show More				

Delete a budget

You must make sure the budget is set to a zero balance before you delete it. To delete an expense budget, create a BGE44 document.

1. Modify budget down to zero, by creating a BGE44 and zeroing out the lines.
2. Once submitted, create a BGE44:

- Select **Action:** Delete



*Action	Budget FY	Fund	Department	Appr Unit	Group	Unit	Object
New							
- Select -							
New							
Modify							
Deactivate							
Reactivate							
Delete							

- Select **Event Type:** BG10 (Delete Budget Line)

Enter budget information as needed.

- On the **three-dot menu**,  select the **Rollup Lines** action.
- Select **Validate**
- Select **Submit**

The budget will be gone from your Expense Budget table.