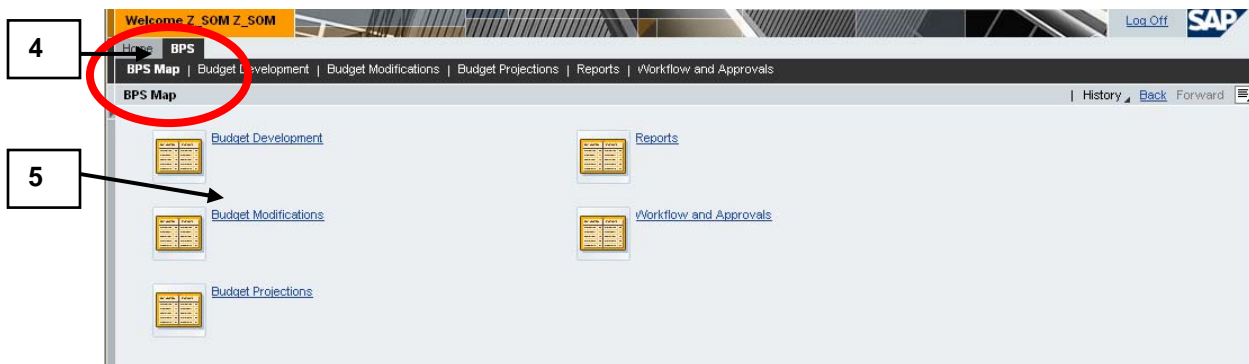


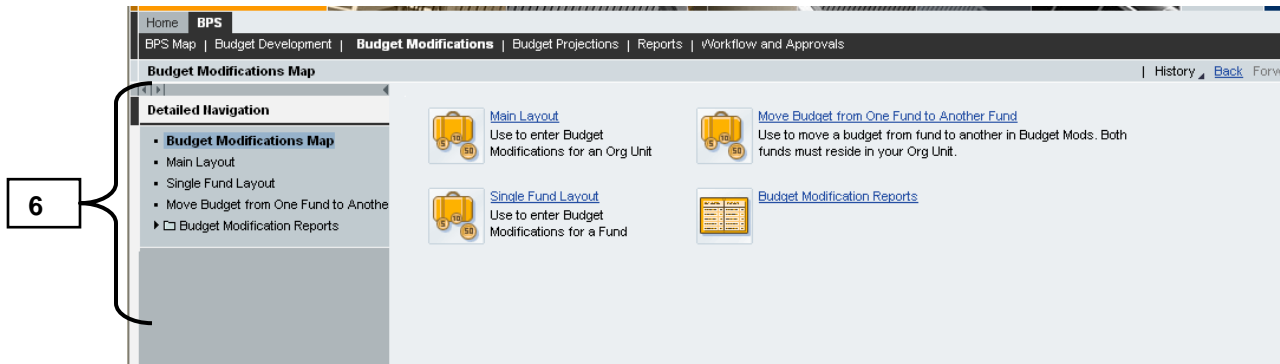
# BPS Budget Modifications

## Accessing BPS

1. Log onto **work.duke.edu** (do **NOT** type in *http://www.*)
2. Enter your **NetID** and **password**.
3. If your browser displays a security dialog box, click **Yes**.



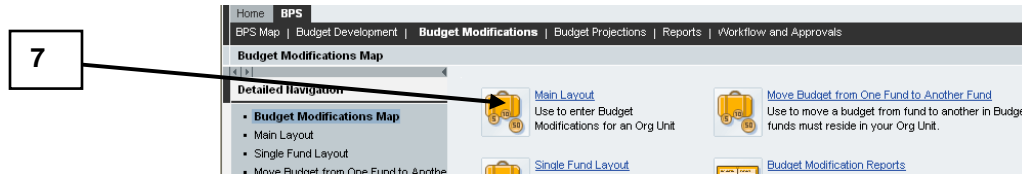
4. Select the **BPS** tab to display the **BPS Map** screen (shown below).
5. On the BPS Map, click on **Budget Modifications** to go to the **Budget Modifications Map**.



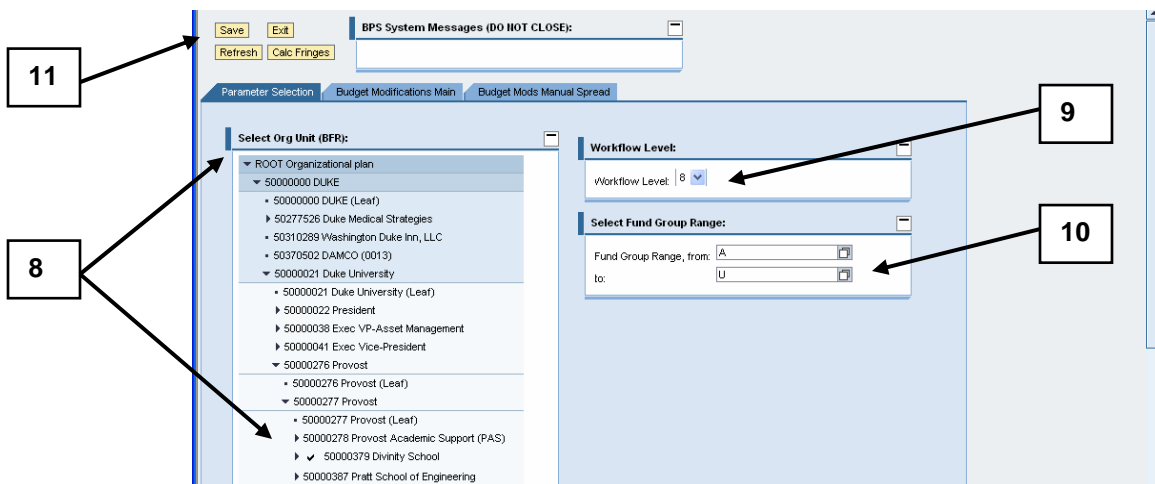
6. On the resulting Budget Modifications Map (shown above), note the layouts and descriptions included on this map as follows:  
**Main Layout**; **Single Fund Layout**; **Moving Budget from One Fund to Another Fund** and **Budget Modification Reports**.

# BPS Budget Modifications

## To Enter Budget Modifications for an Org. Unit (BFR Code)

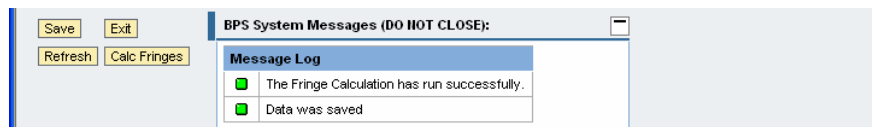


7. Click on the **Main Layout** link (if your browser displays a security dialog box, click **Yes**).



*Note: Do NOT close the BPS System Messages tray.*

8. On the **Parameter Selection** tab, use the **Select Org Unit (BFR)** tray to choose an organizational unit (use  **Expand** tray if needed):
  - Open branches of tree to find the desired org. unit level.
  - Click once on the desired level to choose that level (a check mark indicates this level is chosen).
9. Note the **Workflow Level** that defaults in that field.
10. Enter values in the **Select Fund Group Range** fields as desired, such as **A to U** for all Fund Groups (the default).
11. Scroll to the top and click on the **Save** button and review the messages - if successful, the following messages will appear:



# BPS Budget Modifications

Fund	Fund Grp	Org Unit	Commt Itm (G/L Acct)	LI	Spread	Original Budget	Last Revised Budget	Revised Budget	\$ Change, Rev. vs. Last Rev.		
1567971	BUILDING-xxx XXXXXXXX	Result				11,915	0	0	0		
1568315	xxxx XXXXXXXXXXXX	U	3280063012 - Stores - Administrat	600000	ADM EFF SUP GEN	1	AAA	0	0	50,000	50,000
				610000	FRINGE BENEFITS-	1	AAA	0	0	10,450	10,450
				610100	FR BEN - NON-GOV	1	AAA	0	0	900	900
				644000	HOUSEKEEPING S&M	1	EEE	0	2,060	2,060	0
				645500	MAINT & SHOP S&M	1	AAA	0	515	515	0
				646000	OFC SUPPLIES/MTL	1	AAA	0	0	1,600	1,500
						2	EEE	0	0	15,000	15,000
				681070	M&R-BLDG REPAIR/GEN	1	AAA	0	1,545	1,545	0
				681100	M&R-RENOV-BUILDINGS	1	AAA	515	515	515	0
				681200	M&R-BLDG PAINTIN	1	AAA	0	7,210	8,000	790
						2	AAA	0	0	15,000	15,000
				681400	M&R-BLDG SECURIT	1	AAA	2,575	2,575	2,575	0
							OOO	0	1,236	1,236	0
				681470	M&R SECURITY SYSTEMS	1	AAA	0	515	515	0
				681500	M&R-EXTERMP/PEST	1	AAA	2,472	2,472	2,472	0

12. Click on the **Budget Modifications Main** tab.
13. Review the columns on the **Budget Modification Main** screen:
  - Fund (with name), Fund Group, Org Unit (with 10 digit BFR code)
  - Commitment Item (G/L Account)
  - Line Item (LI)
  - Spread (contains the spread code for that line)
  - Original Budget, and Last Revised Budget
  - Revised Budget (used to enter new amounts as needed).
  - \$ Change (compares Revised Budget to Last Revised Budget)
14. Review the bottom of the screen to see the number of rows currently displayed and the total number of rows available (normally 1 to 17 per page - adjust the **To** number to scroll through all pages, if preferred).
15. Use the scroll buttons to move up or down the rows as needed, for example: 1 line down / page down / bottom.
16. To write a note for any budget modification:
  - Click on the radio button for that line.
  - Use the resulting white space below the scroll buttons at the bottom to enter the text for the note and click **Save**.

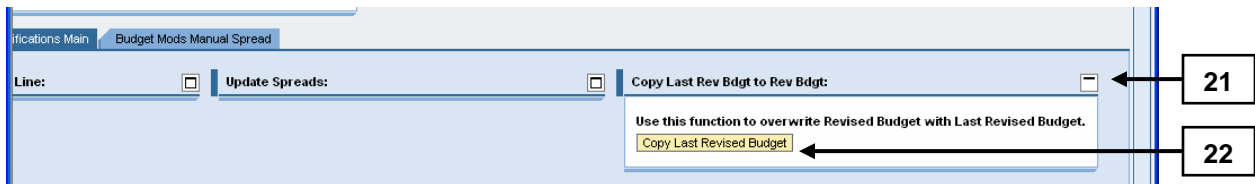
# BPS Budget Modifications

17. To modify the current budget, enter amounts in the outlined fields under the **Revised Budget** column (if desired, use the **Copy Last Revised Budget to Revised Budget** tray as a starting point).
18. Click on the **Save** button and review the messages at the top.
19. Note the changes to the amounts in both the **Result** row amount and the **\$ Change Rev vs. last Rev** column.

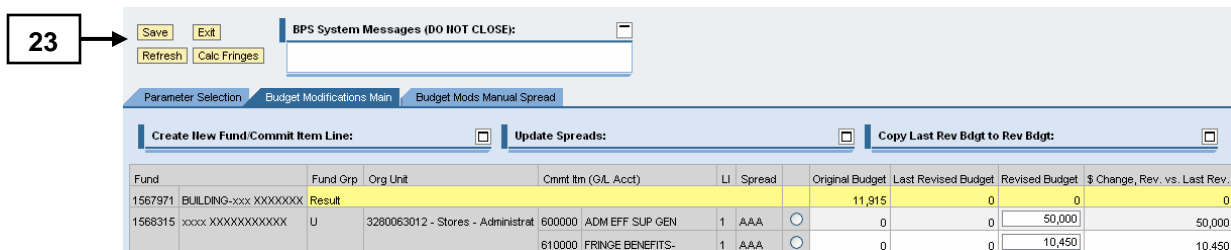
*Note: The **Last Revised Budget** column fields will update based on the previous month's entries. The Budget Office updates that column monthly.*

20. If needed, use the three trays to **Create a New Fund or Commitment Item, Update Spreads, or Copy Last Revised Budget to Revised Budget** as outlined in the next pages.

## Copy Last Revised Budget to Revised Budget



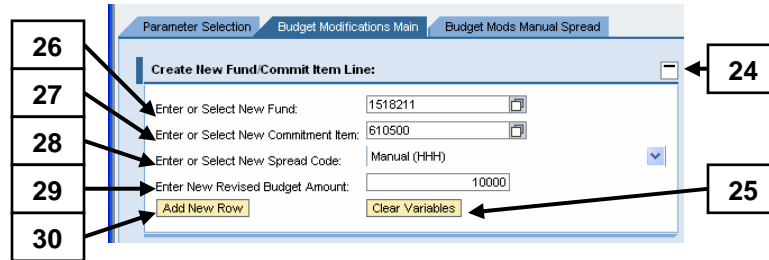
21. Open the **Copy Last Rev Bdgt to Rev Bdgt** tray (click on ).
22. Click on the **Copy Last Revised Budget** button to copy the budget.





23. Click on **Save**.

# BPS Budget Modifications

## Create a Fund or Commitment Item



24. Open the **Create New Fund/Commit Item line** tray (click on ).
25. As needed, use **Clear Variables** to clear any previous selections.
26. Enter the **seven digit fund** in the **Enter or Select New Fund** field.
27. Enter the **six digit G/L Account** in the **Enter or Select New Commitment Item** field.

*Note:* The above fields contain a  **Callout** button to search for a value if needed (with SAP search functions including the use of \* wildcards, like 64\* to find all G/L accounts for supplies & materials).

28. Select a new **Spread Code** (via **Drop down** list).
29. Enter the **amount** in the **Enter New Revised Budget Amount** field.
30. Click on the **Add New Row** button.
31. Review the layout to verify that the fund or commitment item and budget amount was inserted as specified.

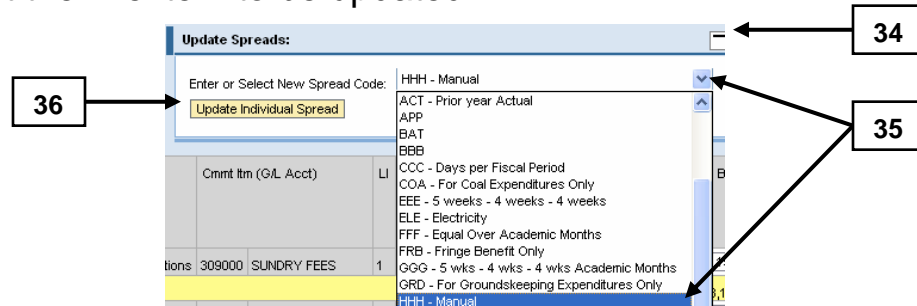
*Note:* If a row is added for a Fund / Commitment Item that already exists, then BPS creates an additional line with a sequential item number (2, 3, 4, etc.).


32. Click on **Save**.

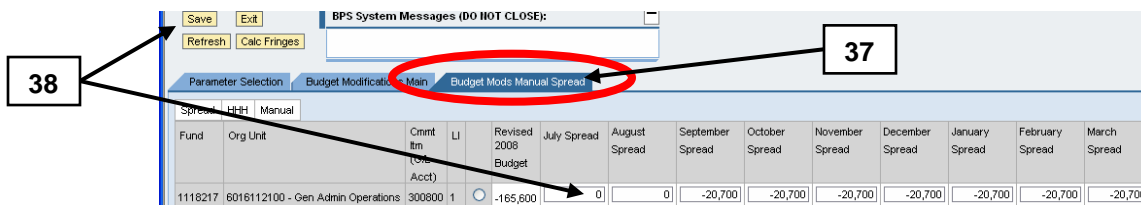
# BPS Budget Modifications

## Update Spreads

33. On the **Budget Modifications Main** tab, click on the **radio button** to select the line item to be updated.



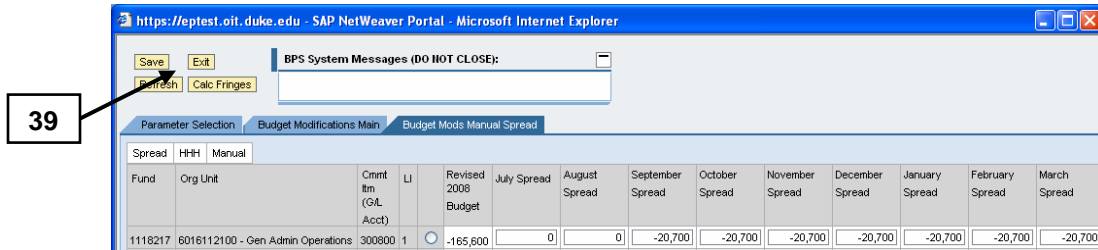
34. Open the **Update Spreads** tray (click on ).
35. Click in the **Enter or Select New Spread Code** field (or use the **Drop Down**) to select a new spread, such as **HHH** for a manual spread.
36. Click on the **Update Individual Spread** button to enter the new spread, then click on **Save** (check the save messages).




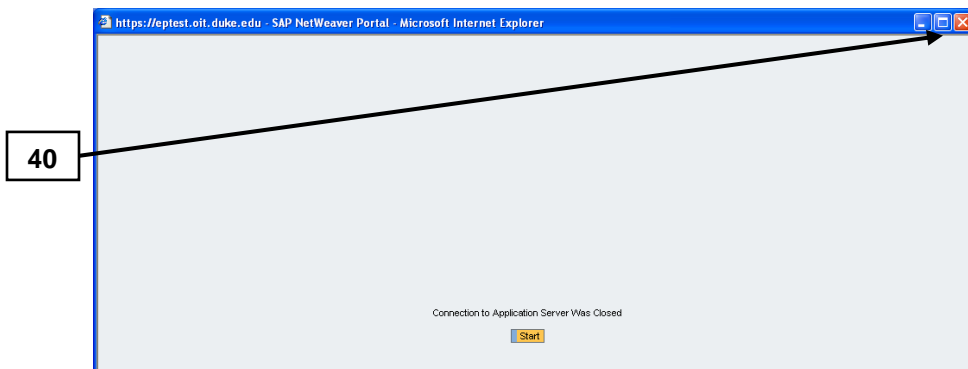
37. To enter or modify any manual spreads (**Code HHH**), click on the **Budget Mods Manual Spread** tab (towards top of window).
38. Enter or change the current manual spreads for July through May, and click on **Save** (June cannot be entered and defaults to the revised annual budget less the sum of the 11 months entered).


# BPS Budget Modifications

## To Return to the Budget Modifications Layout (initial Screen)



39. Click on the **Exit** button at the top and click **Yes** to logoff when prompted (do **NOT** use the  button in the upper corner to exit the budget screen).

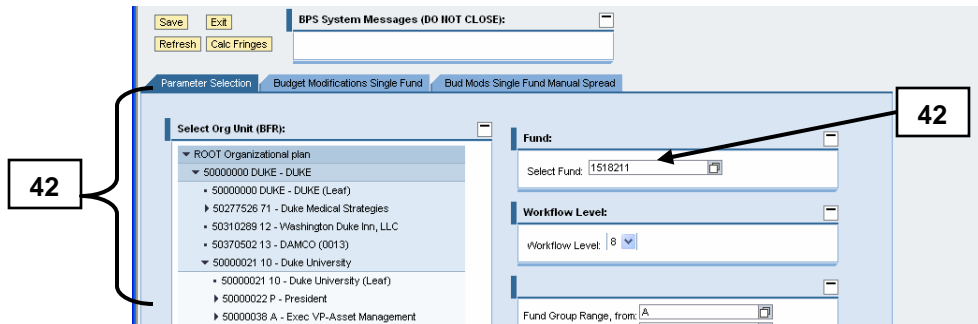


40. In the resulting screen (shown above), click on the  button to close (do **NOT** click on the Start button in the middle of the screen).

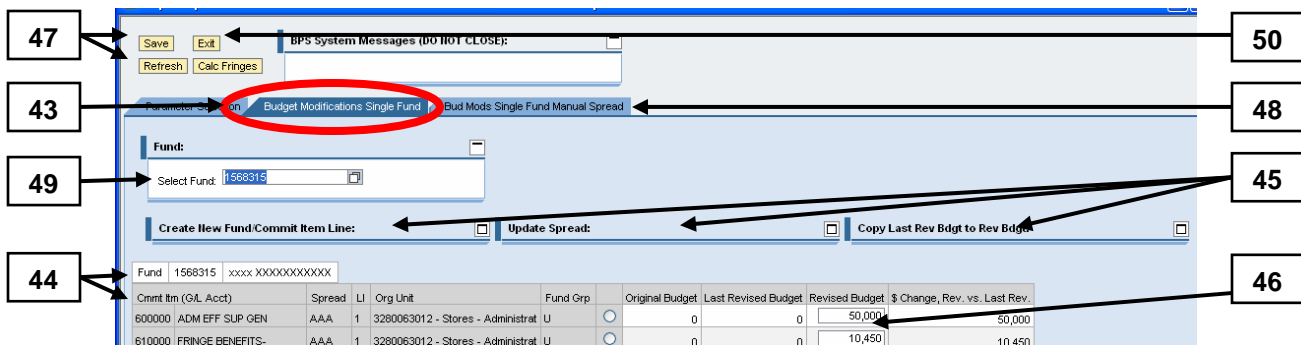
# BPS Budget Modifications

## To Modify a Single Fund

- From the **Budget Modifications** screen, click on the **Single Fund Layout**.





- Enter a fund in the **Fund** field and check the other parameters (the Org Unit selection defaults if previously saved on other screens).



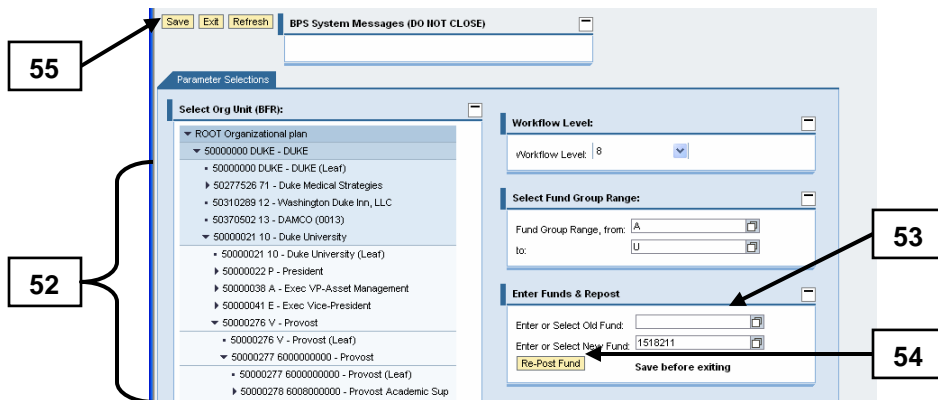
- Click on the **Budget Modifications Single Fund** tab to view the commitment items for that fund.
- Note that the fund chosen displays in white; the first column lists the **Commitments Items (G/L Accounts)** for that fund; and other columns are similar to the Main layout, as follows:
  - Original Budget, and Last Revised Budget
  - Revised Budget (used to enter new amounts as needed).
  - \$ Change (compares Revised Budget to Last Revised Budget)
- As desired, open the appropriate trays and follow the steps previously outlined in the Main Layout to do the following:
  - Create New Fund/Commitment Item row
  - Update Spread (use **Add a New Row** or **Update Individual Spread** buttons)
  - Copy Last Revised Budget to Revised Budget

# BPS Budget Modifications

46. Enter changes in the **outlined fields** of the **Revised Budget** column.
47. Click on **Save** or **Refresh** to update as needed.
48. To modify an existing manual spread, click on the **Bud Mods Single Fund Manual Spread** tab, enter the new spreads, and **Save**.
49. Use the **Fund** tray to enter and select another fund in the **Select Fund** field (click **Refresh** to view and modify the fund selected).
50. As a reminder, to return to the main screen, click on **Exit** (NOT ); click **Yes** to logoff; then click on the  button (NOT **Start**).

## To Move the Budget from One Fund to Another Fund

51. From the **Budget Modifications** screen, click on the **Move Budget from One Fund to Another Fund** layout.



52. Ensure all other parameter selections are made (**Org. Unit**, etc.).
53. In the **Enter Funds and Repost** fields, enter the **old** and **new** funds.  
*Note: Both funds (budget moving from and budget moving to) must reside in your Org. Unit (BFR Code).*
54. Click on the **Re-Post Fund** button.
55. Click on the **Save** button (**must be done before editing the budget**).

# BPS Budget Modifications

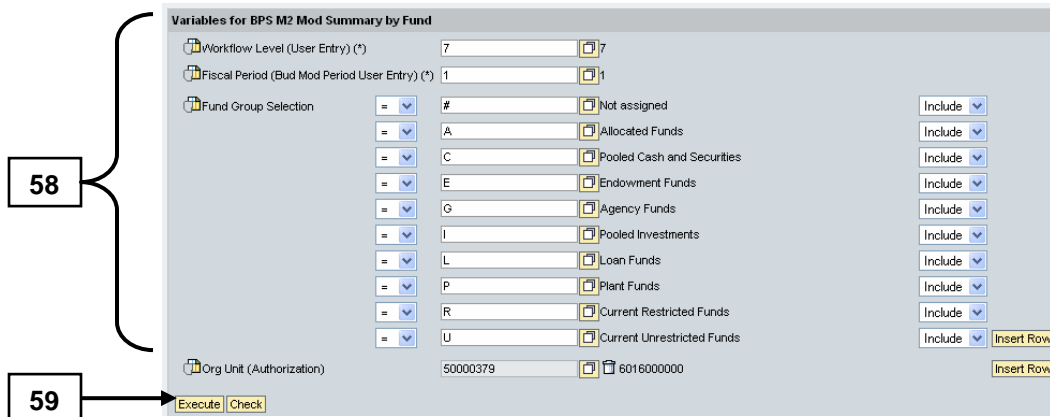
## To Review Budget Modification Reports:

*Note: Many reports contain the YTD Actual amounts. If needed, use those reports to review this data before making modifications.*

56. From the **Budget Modifications** screen, click on the **Budget Modification Reports** layout.



57. Click on the desired report (see descriptions under each link).

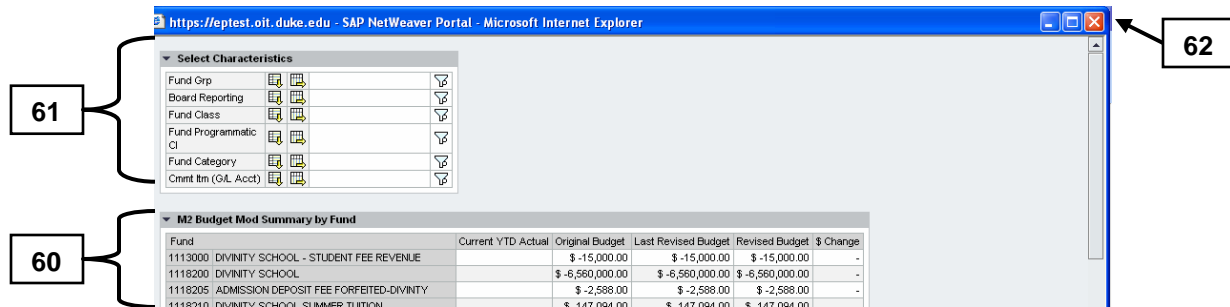



58. Enter the selection variables for the chosen report such as:

- Workflow level
- Fiscal Period
- Fund Group selection (click the dropdown to Select All)
- Org Unit.

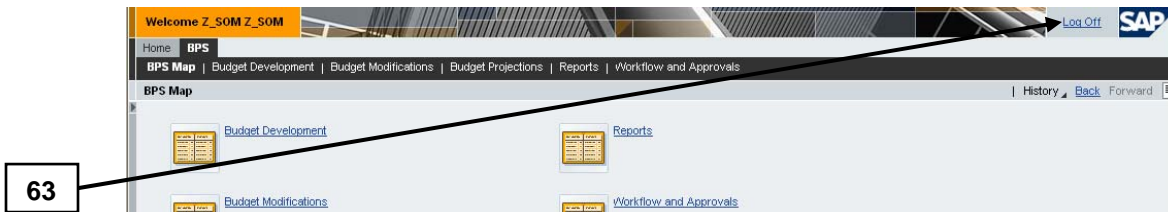
59. Click on the **Execute** button to run the report.

# BPS Budget Modifications



60. In the resulting report, review the budget modification data.
61. Use the **Select Characteristics** section to rotate and modify the report (refer to the BPS Guide for more on reporting if needed).
62. To exit the report, click on the  button in the upper right corner.

## To Exit the Budget Modification Tool When Done:



63. On the main screen, click on the **Log Off** button (upper left corner).