



Work Instruction

Modify a Sponsored Budget Using a Saved Account Set

Purpose

Use this procedure to modify a sponsored budget directly in the Budget Tool using a previously saved account set.

Trigger

You need to make a change to an existing sponsored budget.

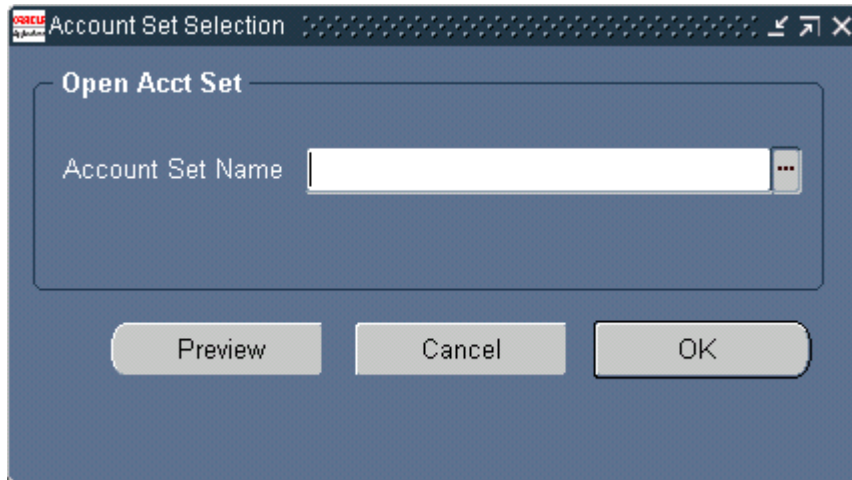
Prerequisites



If necessary, you have obtained sponsored or OSR approval to make the budget change.

Procedure

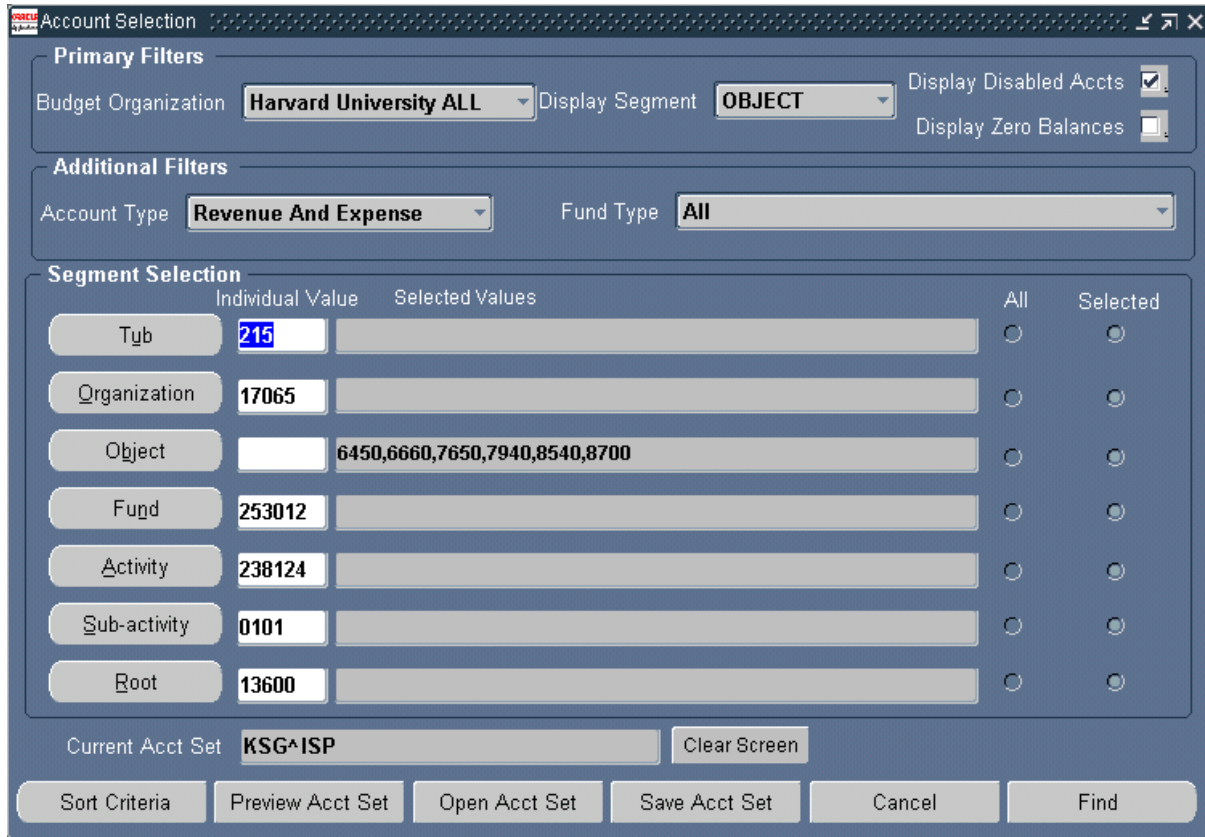
1. Start the task by selecting **Sponsored → Modify/Query Saved Budget → Select Saved Budget** to go to the *Account Set Selection* screen.

Account Set Selection



2. Click  to see the list of saved account sets.
3. Click  to open the account set and go to the *Account Selection* screen.

Account Selection



Primary Filters

Budget Organization: **Harvard University ALL** | Display Segment: **OBJECT** | Display Disabled Accts: | Display Zero Balances:

Additional Filters

Account Type: **Revenue And Expense** | Fund Type: **All**

Segment Selection

	Individual Value	Selected Values	All	Selected
Tyb	215		<input type="radio"/>	<input type="radio"/>
Organization	17065		<input type="radio"/>	<input type="radio"/>
Object		6450,6660,7650,7940,8540,8700	<input type="radio"/>	<input type="radio"/>
Fund	253012		<input type="radio"/>	<input type="radio"/>
Activity	238124		<input type="radio"/>	<input type="radio"/>
Sub-activity	0101		<input type="radio"/>	<input type="radio"/>
Root	13600		<input type="radio"/>	<input type="radio"/>

Current Acct Set: **KSG^ISP** | Clear Screen

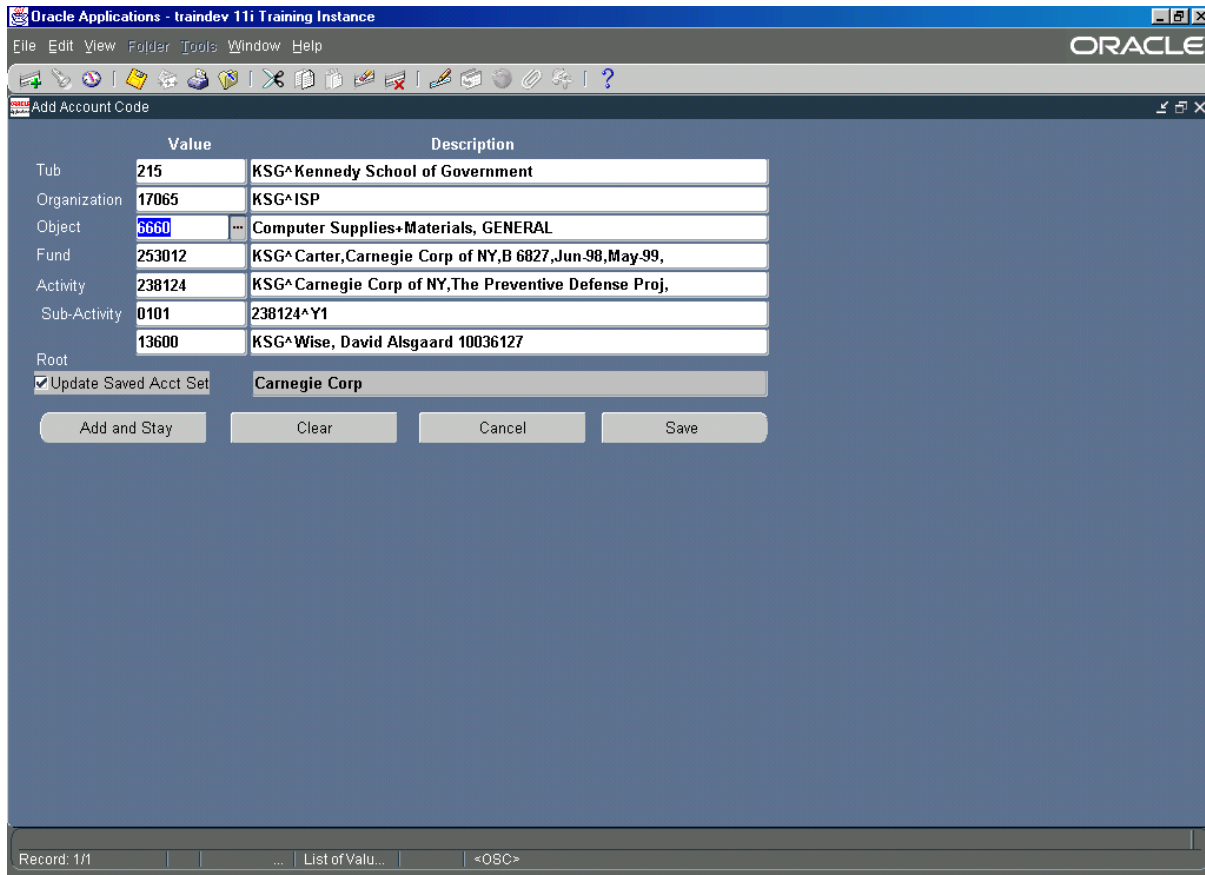
Sort Criteria | Preview Acct Set | Open Acct Set | Save Acct Set | Cancel | Find



If you want to select another account set, click **Open Acct Set** to preview an account set, click **Preview Acct Set**.

- Click **Find** to go to the *Sponsored Budget Input* screen and display the sponsored budget.

Add Account Code



	Value	Description
Tub	215	KSG^ Kennedy School of Government
Organization	17065	KSG^ ISP
Object	6660	Computer Supplies+Materials, GENERAL
Fund	253012	KSG^ Carter, Carnegie Corp of NY, B 6827, Jun-98, May-99,
Activity	238124	KSG^ Carnegie Corp of NY, The Preventive Defense Proj,
Sub-Activity	0101	238124^Y1
Root	13600	KSG^ Wise, David Alsgaard 10036127


Update Saved Acct Set Carnegie Corp

Buttons: Add and Stay, Clear, Cancel, Save

Status bar: Record: 1/1 ... List of Valu... <OSC>

6. Double-click the **Object** value.
7. Enter the Object code you want to add to the award budget.



Click  to view the List of Values and select the object code(s) you want to add.

8. Press **Enter** to view the description for the object code you added.




9. Perform one of the following:

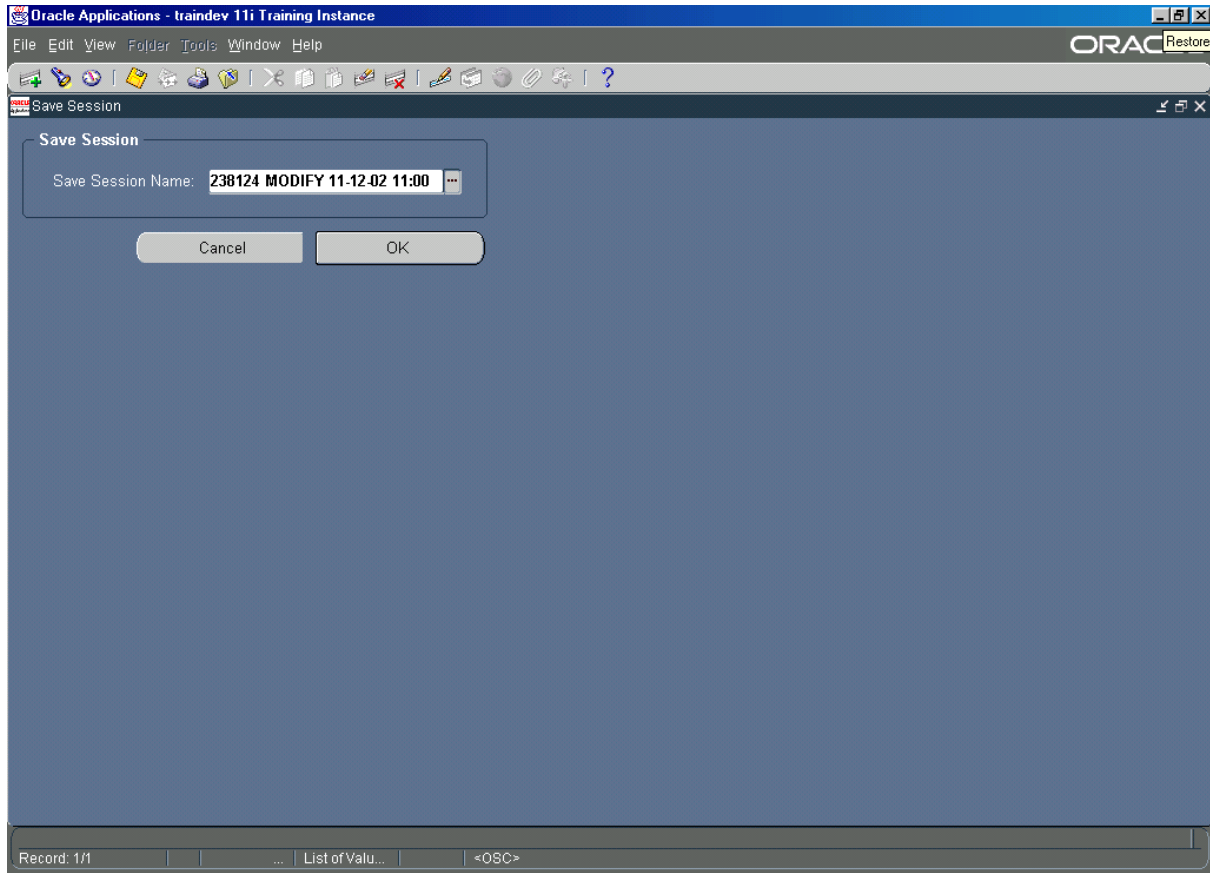
If You	Then
Need to add more object codes to the budget	1. Click Add and Stay 2. Repeat the Steps 7 through 9 until all object codes have been added.
Have added all the necessary object codes	Click Save to go to the <i>Sponsored Budget Input</i> screen to enter an amount for the object code(s) added.
Want to add the new account to the account set	Ensure that <input checked="" type="checkbox"/> Update Saved Acct Set is selected (the default is to automatically update the account set you chose).

Sponsored Budget Input


10. Perform one of the following actions on the *Sponsored Budget Input* screen:

If You	Then
Are temporarily saving your work without submitting the budget to the General Ledger	Click Save Session to go to the Save Session screen.  The Save Session function temporarily saves your work for thirty days.
Have completed your budget and are ready to submit the budget to the General Ledger	Click Submit to go to the <i>Save Session</i> screen.

Save Session



11. Complete the following required field:

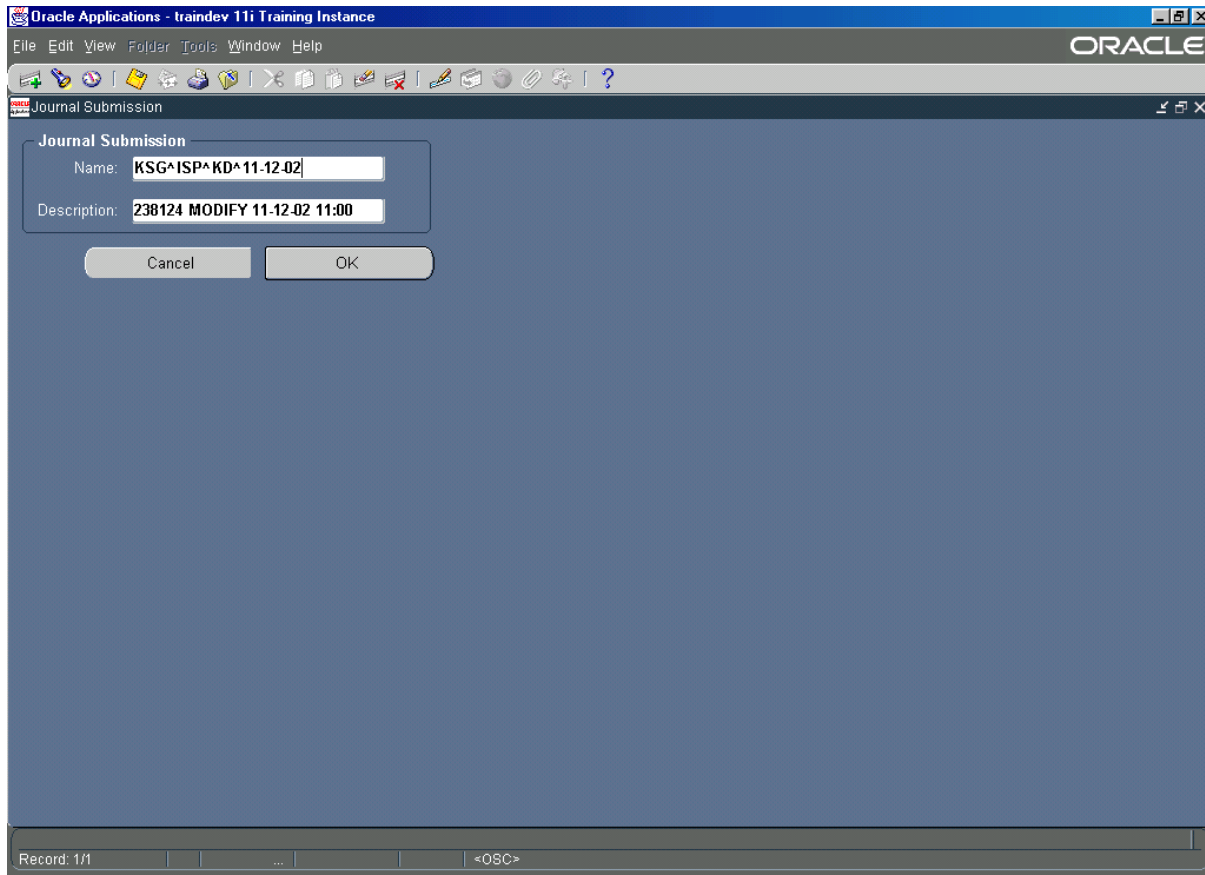
In This Field	Enter
Save Session Name:	Session Name  This if your private session, so use a description that reminds you of what you are budgeting. Recommendation: Use the following naming convention to name the session: Activity Description MM-DD-YY Time Example: 238124 MODIFY 11-12-02 11:00

12. Click .

13. Perform one of the following:

If You	Then	Go To
Have completed all budget revisions	Submit the budget to the General Ledger.	Step 15
Are temporarily saving your work without submitting the revised budget to the General Ledger	The system will temporarily save your budget for seven days. To resume working on your budget, select Sponsored → Resume Session from the Navigator menu to recall the <i>Sponsored Budget Input</i> screen.	Step 12

Journal Submission



The screenshot shows the Oracle Applications 'Journal Submission' dialog box. The window title is 'Oracle Applications - traindev 11i Training Instance'. The menu bar includes 'File', 'Edit', 'View', 'Folder', 'Tools', 'Window', and 'Help'. The toolbar contains various icons for file operations. The dialog box has a title bar 'Journal Submission' and a main area with the following fields:

- Name:** KSG^ISP^KD^11-12-02
- Description:** 238124 MODIFY 11-12-02 11:00

At the bottom of the dialog box are two buttons: 'Cancel' and 'OK'. The status bar at the bottom of the window shows 'Record: 1/1' and '<OSC>'.

14. As required, complete the following fields:

In This Field	Enter
Name:	Name of the journal Recommendation: Use the following naming convention to name the journal: TUB prefix^Org abbreviation^Your initials^Date (MM-DD-YYYY) Example: KSG^ISP^KD^11-12-02

In This Field	Enter
Description:	Description of the journal Recommendation: Use the following naming convention to name the journal: Activity Description MM-DD-YY Time Example: 238124 MODIFY 11-12-02 11:00

15. Click .



A message displays indicating that you have successfully modified the account.

Result

You have successfully modified a sponsored budget.

Comments

You have completed this procedure. Select **Action** → **Exit Oracle Applications** to exit the system.