

Work Instruction

Query an Existing Budget to Create an Account Set or Print the Budget

Purpose

Use this procedure to query an existing budget in the General Ledger and then either create an account set or print the budget.

Trigger

You have submitted a sponsored budget to the General Ledger and want to review, print, or create an account set for the budget.

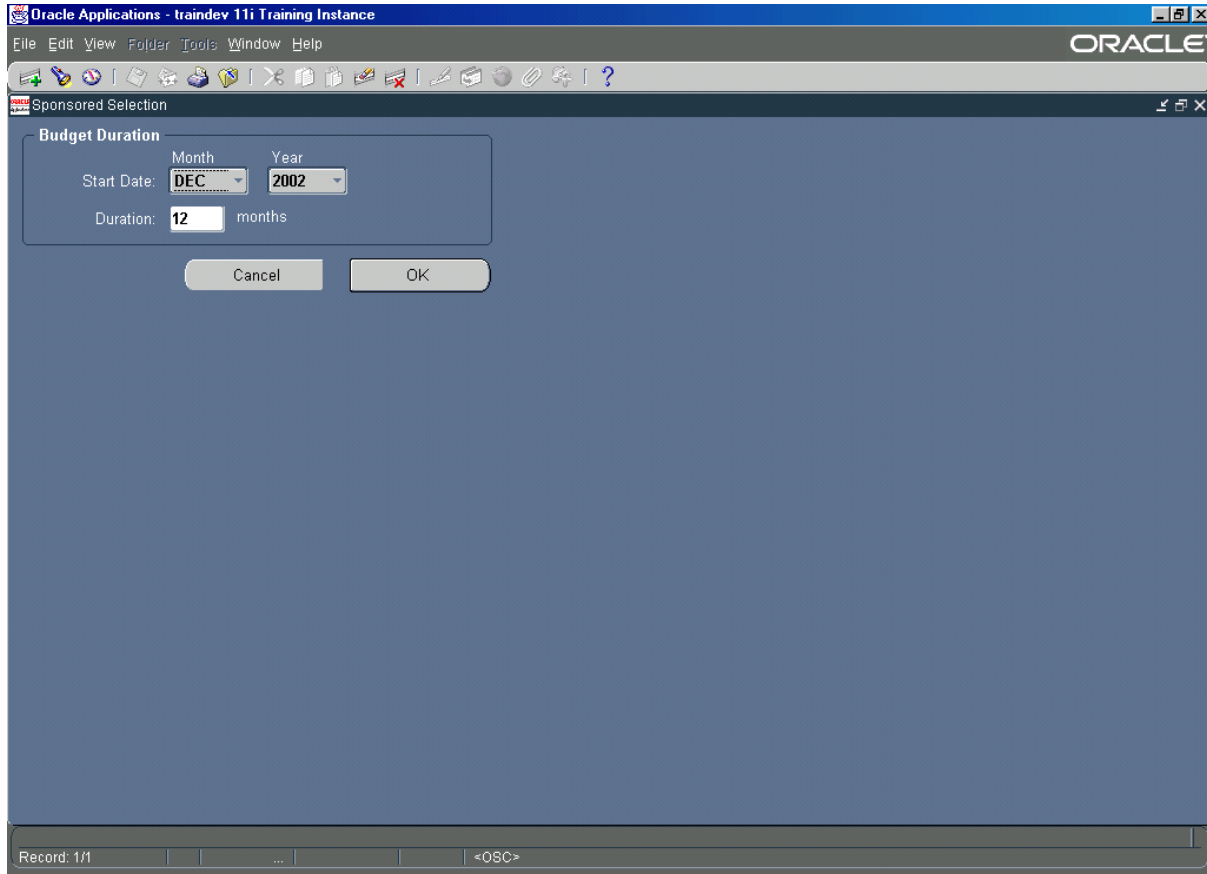
Prerequisites

The budget has been submitted to the General Ledger.


Procedure

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


Sponsored Selection



2. Complete the following required fields:

In This Field	Enter
Start Date:	Start date (month and year) of the grant award budget you are entering  You must select the Month and Year from the pulldown lists for the system to register the date.



In This Field	Enter
Duration:	Number of months for which the grant you are entering has been awarded  Use whole numbers only.

3. Click **OK** to 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
Type	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

4. Perform one of the following:

If You Need To	Then
Create and save an account set for this budget query	1. Click Save Acct Set . 2. Type a name for the saved set. 3. Click OK .
Open a previously saved account set	1. Click Open Acct Set . 2. Click ... to see the list of account sets. 3. Select an account set and click OK to return to the <i>Account Set Selection</i> screen. 4. Click Preview Acct Set to go to the <i>Preview Account Set</i> screen. 5. Select an account and click OK to preview the account. 6. On the <i>Preview Account Set</i> screen, click Open Previewed Set to use this set and go to the <i>Account Selection</i> screen. 7. On the <i>Preview Account Set</i> screen, click Return to go back to the <i>Account Set Selection</i> window.
Preview a previously saved account set to see the values it contains	1. Click Preview Acct Set . 2. Select the set to use. 3. Click OK to return to the <i>Account Selection</i> screen.

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



When amounts display in the Totals and budget period columns on the *Sponsored Budget Input* screen, this indicates that the budget has been submitted to the General Ledger.



Comments

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