

Conversion issues for Project Budget and Commitment Control

When you had conversion issues and the project budget is not correctly represented the first step is to correct the project budget.

Adjust the project budget by releasing the project budget correctly based on the legacy and award information. The project budget should reflect the values you would want to appear on the PI report for that award.

Steps:

1. Navigation: Grants > Awards > Project Funding
2. Click the plus sign
3. Add the appropriate budget information
4. Save the page
5. Send the budget to KK
6. Finalize the entries (this loads the project budget to the project resource table)

At this point we have probably adjusted the budget incorrectly in the KK values. So now you must undo the project budget values on the KK tables.

Steps:

1. Navigation: Commitment Control > Maintain Budgets > Enter Budget Journals
2. Add the business unit, leave the journal id = NEXT and today's date defaults which is correct, Click the Add button
3. The ledger group for the budget journals is GNTDTL
4. Click the Budget Lines tab at top and enter the required chartfields and the appropriate budget amount, either minus or plus values depending on whether you are reducing (minus) or increasing (plus) budget in the KK tables. You can enter multiple lines by clicking the add lines.
5. Save the page to have the journal id assigned. Also if there are bad values in any of the chartfield fields it will give you an error message. Remember, this applies to bad values not incorrect values. As long as the value is available in the lookup it will be accepted in the screen.
6. Click the post button in the upper right corner. It will take you to a message "Are you sure you want. . ." Click the yes button. Once the budget journal has posted the Budget Header Status will change to P. You should review the budget detail information to be sure everything processed correctly. If there is an error in the attempt to post the journal the Budget Header Status will be E. You should review the error tab and correct appropriately, save and process again.