

HE Prepare for Budgets Report Job Aid

The HE Prepare for Budgets Report shows information related to funding and budgeted amounts for all positions in a department. The report can be used to review funding sources and budgets that are currently posted as permanent. This report will show the same information as the Department Budget Table without having to go into each individual DBT. The HE Prepare for Budgets Report should be run at the beginning of the annual budget process to verify the information that will appear on the salary worksheets.

1. Sign in to PeopleSoft HRMS.
2. Navigate to **ND HE Applications > Budgeting > HR (Salary and DBT) Budgeting > HE Prepare for Budgets Report**
3. Click the **Add a New Value** tab.
 - a. Enter a **Run Control ID** that is meaningful to you. Please remember no special characters or spaces can be used when creating a Run Control ID.
 - b. Click the **Add** button.
 - c. These steps will only need to be completed the first time. After a Run Control ID has been created the **Find an Existing Value** tab can be used instead.
4. HE Prepare for Budgets Report parameters
 - a. The **Budget Unit** field will be:
 - i. NDSU – 235
 - ii. NDFS – 244
 - iii. UGPTI – 627
 - b. Enter the **Fiscal Year**.
 - i. The upcoming Fiscal Year needs to be entered.
 1. When running the report during FY20 the fiscal year entered will need to be 2021.
 - ii. A Fiscal Year runs from July 1 to June 30. The Fiscal Year will be the same as the calendar year on June 30.
 - c. Optional: Enter the **Dept From** and **Dept To**.
 - i. If running for a single department enter the department number in both fields.
 - ii. If running for a range of departments enter the range.
5. Click the **Save** button
6. Click the **Run** button
 - a. On the **Process Scheduler Request** page, the default for the report is *Web/TXT*. If you would like to change this to a different format you can do so at this time. (Ex. CSV)
7. Click the **Ok** button, the Run Control page is returned
8. Click the **Process Monitor** hyperlink, **Process Type** is *Application Engine*, **Process Name** is *NDU_BG_BUD*.
9. Click the **Refresh** button until the **Run Status** is *Success* and the **Distribution Status** is *Posted*.
 - a. If you had the report emailed to you stop here and check your email. If not, continue below.
10. Click the **Details** hyperlink.
11. Click the **View/Log Trace** hyperlink.
12. Click the link to open the .csv file.
 - a. The report will open in Excel.