TRAINING DOCUMENT FOR COMPLETING TEMPORARY OR PERMANENT BUDGET REVISIONS

Course Objectives:

I. What are Temporary and Permanent Budget Revisions?
II. When would one be completed?
III. How to enter data into the Web Form?
IV. How to view the revision?

I. WHAT IS A TEMPORARY AND PERMANENT BUDGET REVISION?

A Budget Revision Web Form request is used to move existing funding from one source to another. A Temporary Revision affects only the current fiscal year whereas a Permanent Revision affects both current and future fiscal years.

II. WHEN WOULD ONE BE COMPLETED?

The Revision is typically used when budgeted funds are required to be transferred between authorized Purposes and Accounts within the department of a College or Administrative area. Whenever funds are transferred, the total line item amounts (Debits & Credits) must balance. A specific procedure must be followed which will be covered in Objective III.

Each department’s designated financial representative(s) will have the processing authority for their respective unit(s). Although no security measure is in-place to prevent inter-departmental Revisions, the Budget Office will be monitoring the activity to ensure funding moves are correctly completed.
III. HOW TO ENTER DATA INTO THE WEB FORM?

In order to access the Budget Revision Web Form, you must first logon through the Web Forms link available on the UD homepage under the ‘Faculty & Staff’ header.

1) After clicking the Web Forms link, logon using your UDelNet ID and Password. After logging in, click the ‘Blanks’ tab at the top of the page. You will then be directed to the listing of available Web Forms as reflected below; click the ‘FIN Budget Revision’ link.
2) The next screen is the beginning of the Budget Revision. Some key points to consider:

- **Short Description** – Abbreviate when possible to ensure the description is clear for referring back to if necessary. This is the description that will appear on the Web Statement.

- **Explanation** – You can elaborate more on the Revision’s justification. An entry **must** be made in this field prior to clicking the ‘Next Step’ button.

- **Ledger Group** – You may choose either ‘Temp Budget’ or ‘Perm Budget’ from the drop-down menu.

- **Journal Date** – When completing a Temp or Perm Budget Revision, use a current or future date; revisions will be posted on the date specified in this field.

Once all the relevant data is entered click **Next step** to proceed. If you need to save the Revision as a draft, click the ‘Save & exit’ button. If at any point you need further assistance with the Revision form, click the ‘Budget Revision Documentation’ link at the top of the form.

By clicking **Next step**, this will take you to the next screen where you will be entering the financial data.
3) Note that most of the data from the beginning screen is reflected at the top in the yellow box, with the exception of the ‘Explanation and justification’ text box. On this screen, enter the Purpose (SpeedType). If you are unsure of the code to use, click the ‘(lookup)’ link and follow the text box instructions. Once selected, proceed to the next chartfield box.

**Please note the following:**

- Revisions to **Revenue** budget
  - a CREDIT increases budget
  - a DEBIT decreases budget
- Revisions to **Expense** budget
  - a DEBIT increases budget
  - a CREDIT decreases budget

*The above Debit/Credit entries must **ALWAYS** balance at the bottom-line.*

The SpeedType field must be entered **first**. The Class field is optional and is only used for Salary funding, to include Faculty, Professionals, Salaried Staff, Hourly Employees, and Grad Students. The UserField is also an optional field and is used at the department’s discretion.

After entering the applicable chartfield data, enter the amount into the Debit or Credit box as noted above. **When entering amounts for revisions, be sure to round to the nearest whole $1 – do not use pennies for Budget Revisions.**
4) Next, click **Add line** to add the current data to the new Budget Revision entry. You will then be prompted to enter the **Account** data as shown below. If necessary, click the ‘(lookup)’ link to determine which one to use.

![Chart Field Information](image)

5) Once all the relevant data is entered for Line 1, enter the data for Line 2.

**Note:** Once you hit ‘Add Line’, a correction to the specific Line can only be made by clicking the **delete** button which erases the entire entry. After starting a Budget Revision, **do not** use your web browser to navigate forward/backward through the screens; use only the WebForm buttons.

Ex – Clicking **Previous step** will bring you back to the previous screen; clicking the browser’s **button will result in the following screen:**

![Webpage has expired](image)
6) After finishing your entries, click Next step to indicate the Approvers (if applicable) and the people who should be copied on your Revision. The next screen will look like:

Note: At any time during the Revision process, click Save & exit to save your current screen in your ‘Draft Web Form’ folder; this allows you to return back to it at any time. The only time you will not be able to save the current screen is when completing the ‘Approval/Copy’ data section. A helpful tip is to print the ‘Approval/Copy’ screen prior to closing the Revision in the event you have multiple emails to remember.

Use the drop-down menu to select whether a person is an Approver or receiving a Copy of the Revision. Discuss this selection with your Financial Representative as there are certain individuals whom have Approver authority. If you know the person or people to include on the Revision but do not know their email address, click the ‘(lookup)’ link and follow the text instructions. Once found, double-click their name to add it to the Revision.

7) Once all the Roles are completed, click Submit form and the form will be appropriately routed based upon your selections. You will receive an email notification when the revision is either returned to you for correction, or when all approvals have been obtained. Your copy of the Budget Revision will then be in your Web Forms ‘In Basket’ as noted by that tab.
IV. HOW TO VIEW THE REVISION?

You can view the approved revision by either clicking the link in your email notification, or by going to Web Forms and looking at your inbox. Either method will require you to login to Web Forms.

1) Once you login to the Web Form, select the ‘In Basket’ tab and click on your name.
2) Under the ‘Form’ column, click the applicable Budget Revision to view it.

**Note:** The revision can also be viewed under the ‘Archive’ tab because all Web Forms are permanently saved in the Archive when complete.