



Core-CT 9.1 bring three enhancements to Budget Journals:

- An **Alternate Description** field on the Budget Header page
- Ability to enter a SpeedType code directly rather than using the lookup button
- Attachments can be added to the header of a budget journal

Navigation

Commitment Control > Budget Journals > Enter Budget Journals

Alternate Description Field

This field allows users to add an alternate description of a budget journal. This field supplements the **Long Description** field and can be up to 150 characters in length.

The screenshot displays the 'Budget Header' page in the Core-CT 9.1 interface. The page is divided into several sections. At the top, there are tabs for 'Budget Header', 'Budget Lines', and 'Budget Errors'. Below the tabs, the 'Budget Header' section contains various fields for data entry. The 'Unit' is set to 'STATE', 'Journal ID' is 'NEXT', and 'Date' is '10/30/2012'. The '*Ledger Group' is 'KK_ALLOT', 'Fiscal Year' is '2013', and 'Period' is '4'. The 'Control ChartField' is 'Fund Code', '*Currency' is 'USD', and 'Rate Type' is 'CRRNT'. The 'Budget Header Status' is 'None', '*Budget Entry Type' is 'Adjustment', and 'Exchange Rate' is '1.00000000'. The 'Parent Budget Options' section includes checkboxes for 'Generate Parent Budget(s)' and 'Use Default Entry Event', and a 'Parent Budget Entry Type' dropdown set to 'Adjustment'. The 'Cur Effdt' is '10/30/2012' and 'Budget Type' is 'Expense'. There is a link for 'Attachments (0)'. Below these fields are two text areas: 'Long Description' and 'Alternate Description'. The 'Alternate Description' field is highlighted with a red border, indicating it is the focus of the document.

SpeedType Entry

Users can type a SpeedType code directly in the **SpeedType** field or use the Lookup button to select a speed type from a prompt list.

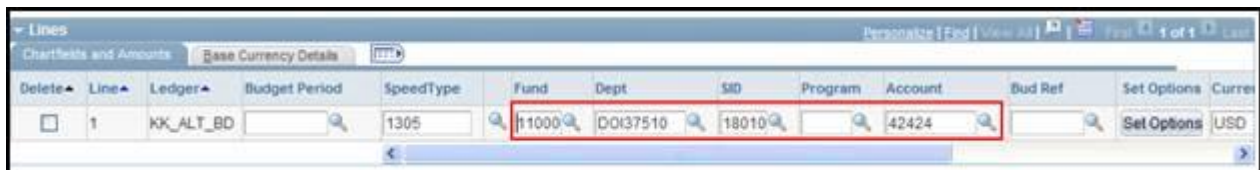
Core-CT 9.1 automatically populates the appropriate ChartField values after an end user enters a valid SpeedType code in the **SpeedType** field and clicks, or tabs, away from the field.



Enter a Value in the **SpeedType** field



Click or tab away from the **SpeedType** field. Core-CT automatically populates ChartFields with the appropriate values.



The lookup button and prompt list for selecting SpeedTypes works the same as it did in Core-CT 8.9.

Attachments

Core-CT 9.1 allows users to add attachments to Budget Journal headers.

The file types that can be attached include:

- doc & docx
- xls & xlsx
- txt
- pdf
- jpeg
- csv

The number in the parentheses () in the **Attachment** link indicates the number of attachments associated with a payment. For example **Attachments (0)** indicates that no files are attached; **Attachments (1)** indicates 1 file is attached.

Example: Attaching a PDF file

Navigate to the **Budget Header** page and click the **Attachments (0)** link.

Budget Header | Budget Lines | Budget Errors

Unit: STATE Journal ID: 0001054623 Date: 12/06/2012

*Ledger Group: KKK_AGY1 Fiscal Year: 2013 Period: 6

Control ChartField: Project *Currency: USD

Budget Header Status: None Rate Type: CRRNT

*Budget Entry Type: Adjustment Exchange Rate: 1.00000000

Cur Effdt: 12/06/2012

Budget Type: Expense

Attachments (0)

Parent Budget Options

Generate Parent Budget(s)

Use Default Entry Event

Parent Budget Entry Type:

Long Description: test

Alternate Description: test

Save Return to Search Notify Refresh Add Update/Display

The **Attachments** page displays. Click **Add Attachment**.

Journal Entry Attachments

Attachments

Business Unit: STATE Journal ID: 0001054623 Journal Date: 12/06/2012

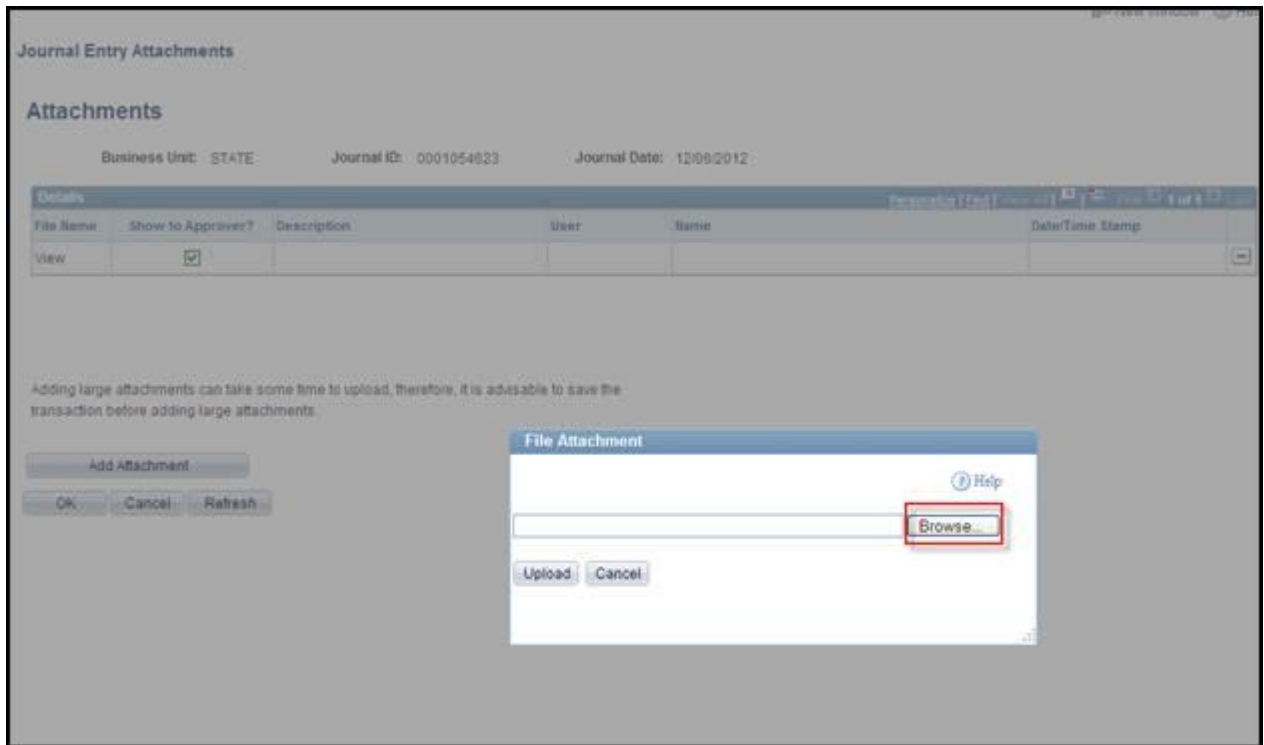
File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
View	<input checked="" type="checkbox"/>				

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

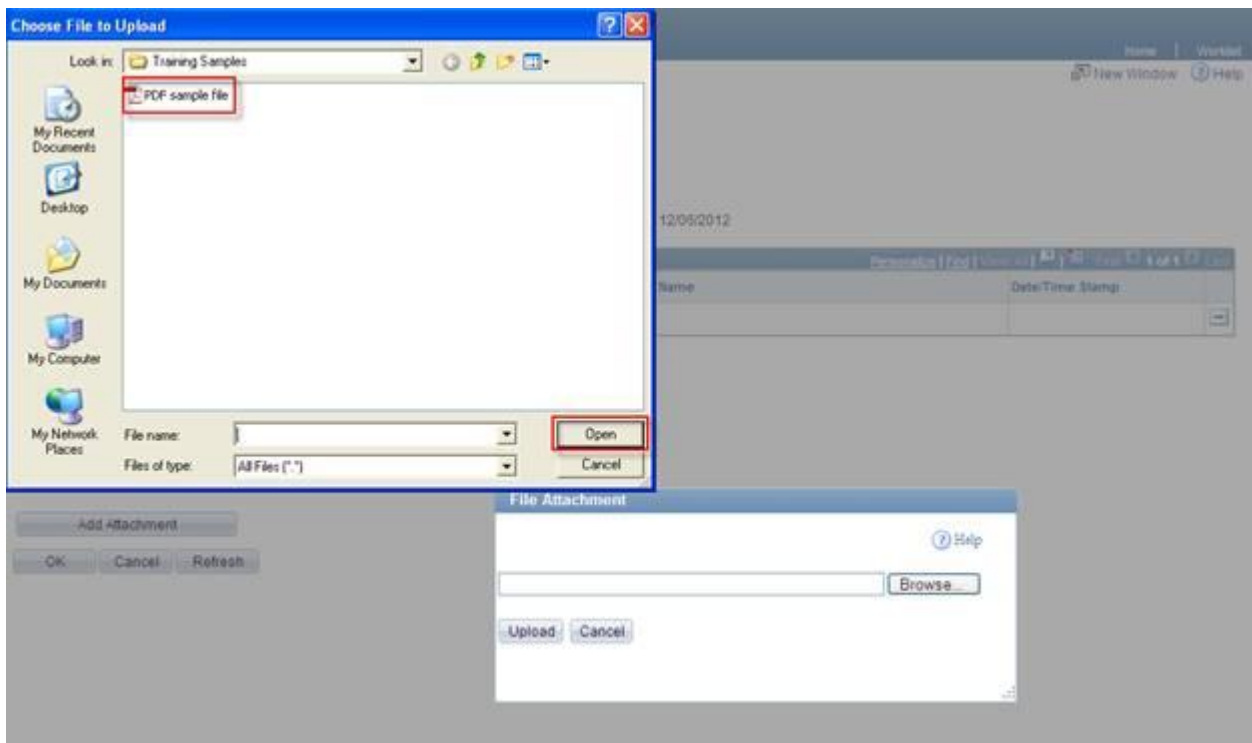
Add Attachment

OK Cancel Refresh

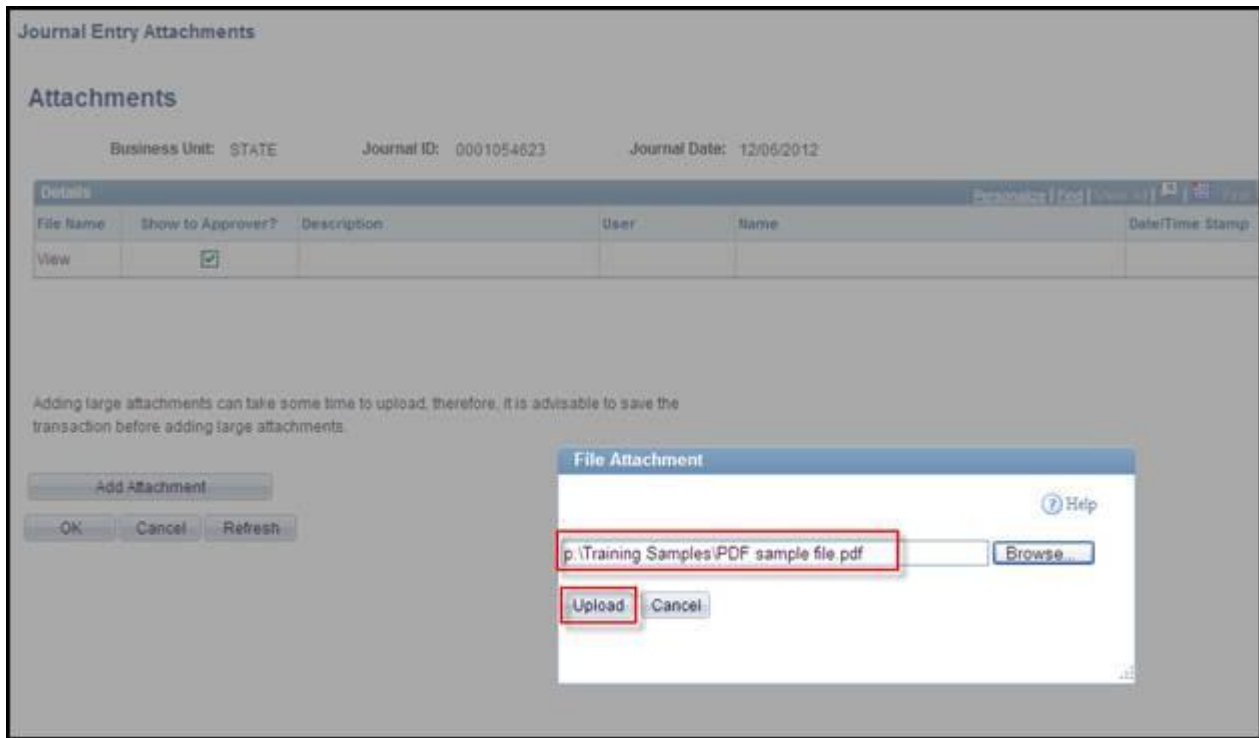
The **File Attachment** dialog box displays. Click the **Browse...** button



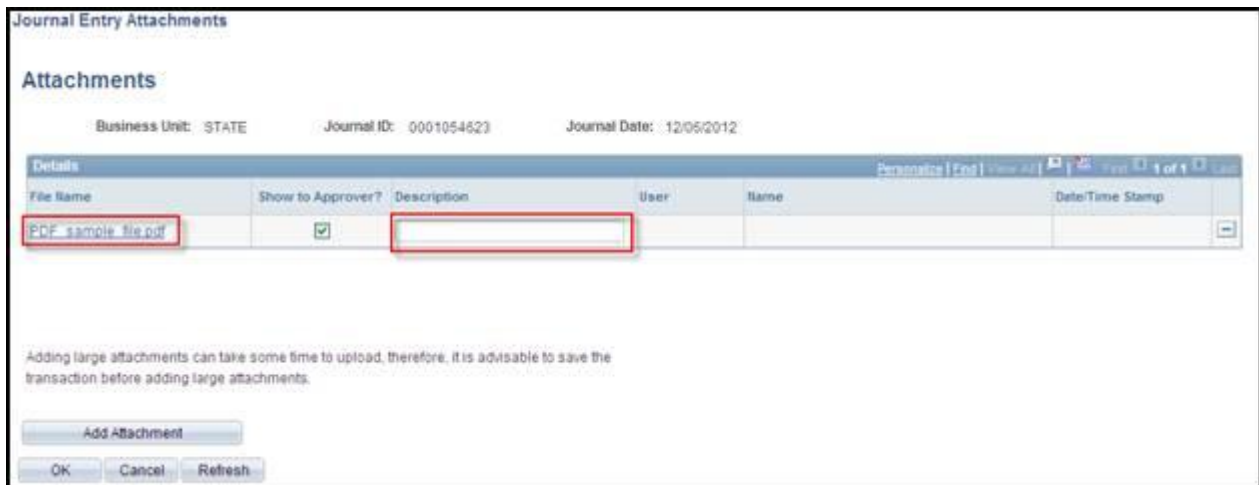
The **Choose File to Upload** dialog box displays. Select the file to upload and click **Open**.



The name of the selected file displays in the **File Attachment** dialog box text box. Click **Upload** to attach the file.



The **Attachments** page displays. The name of the uploaded file displays in the **File Name** Field.



Enter a description of the attached file in the **Description** field.

Journal Entry Attachments

Attachments

Business Unit: STATE Journal ID: 0001054623 Journal Date: 12/06/2012

File Name	Show to Approver?	Description	User	Name	Date/Time Stamp
PDF_sample_file.pdf	<input checked="" type="checkbox"/>	Sample File			

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Add Attachment

OK Cancel Refresh

Click the OK button. (Use the **Minus** button to delete the attachment.)

The **Attachments (1)** link now displays (1). This indicates that one file is attached to the Budget Journal header.

Budget Header Budget Lines Budget Errors

Unit: STATE Journal ID: 0001054623 Date: 12/06/2012

*Ledger Group: KK_AGY1 Fiscal Year: 2013 Period: 6

Control ChartField: Project *Currency: USD

Budget Header Status: None Rate Type: CRRNT

*Budget Entry Type: Adjustment Exchange Rate: 1.00000000

Cur Effdt: 12/06/2012

Budget Type: Expense

Attachments (1)

Parent Budget Options

Generate Parent Budget(s)

Use Default Entry Event

Parent Budget Entry Type:

Long Description: test

Alternate Description: test

Save Return to Search Notify Refresh Add Update/Display

Budget Header | Budget Lines | Budget Errors

Budget Overview Charts

Users can choose to display Budget Overview information on a bar chart, as well as in a grid, by selecting the **Display Chart** option on the **Budget Overview** page.

Budget Overview page

Budget Inquiry Criteria
Budget Overview

Inquiry: BUDGET_OV Description: ALLOT

Amount Criteria Search Clear Reset

Budget Type

*Business Unit: STATE Ledger Group/Set: Ledger Group Ledger Group: KK_ALLOT

View Stat Code Budgets Allotment Budget Defn

Display Chart

Time Span

*Type of Calendar: Detail Budget Period

Budget Criteria

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	KK_ALLOT	AN	2013	2013	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	%	%	i		Update/Add
Dept	AES48000	AES48131	i		Update/Add
Fund	11000	11000	i		Update/Add
SID	10010	10020	i		Update/Add
Program	%	%	i		Update/Add
Bud Ref	%	%	i		Update/Add

Budget Status

- Open
- Closed
- Hold

Budget Overview Results Displayed as a Bar Chart



