

# Dept Budget Table Annual Copy Process

## Copy Department Budget Table Process

The following tasks are used to process the *Copy Department Budget* process. This process inserts new Fiscal Year records into Department Budget tables for Position Level and Pools level records. Appointment records cannot be copied to a new year. They are intended for 1 fiscal year only and must be set up manually if needed. For each pool and position, only the latest active row will be copied to the new year. History is not copied. For example, if you have a pool level row dated 7/1/03 that charges chartfield A and another one for the same pool dated 12/1/03 that charges chartfield B, the program will copy to 12/1/03 row but date it 7/1/04 so that it will be active from the beginning of the fiscal year.

NOTE: The Account Code Copy Process must be run prior to running this process.

Also it is a good idea to review any pools or positions that you do NOT want to copy to the new year so that you can inactivate them before you start the copy process. You can query the "funding end-date" on the DBT to find any positions and pools that may have an ending date.

Prior to running *Copy Department Budget* process, a query can be generated against DEPT\_BUDGET\_DT, DEPT\_BUDGET, DEPT\_BUDGET\_ERN, DEPT\_BUDGET\_DED and DEPT\_BUDGET\_TAX tables to provide the approximate record counts of rows to be inserted. Since the copy process will only bring over Active rows from previous fiscal years, select where Active in the query Criteria for all records except DEPT\_BUDGET\_DT, which is not Effective Dated. In the query Properties, select Distinct. Field to select is Account Code with a parameter of the Fund Code specified. This query should return all Account Codes in which to insert an effective-dated Inactive row.

Here are some queries that have been written to review the tables mentioned above. Run them once for the old year and once for the new year to compute # of rows in each year:

SLO\_LCD\_DBT\_COPY\_DEFAULT\_TBL – use to verify the Default page of the DBT

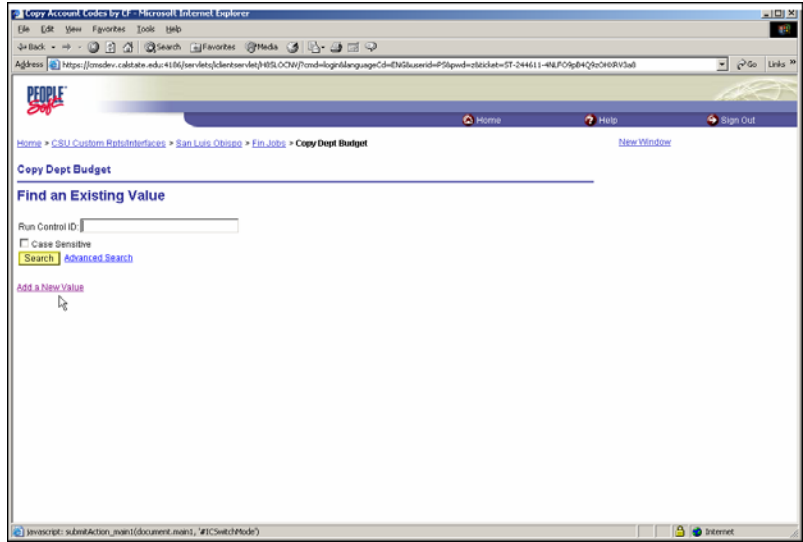
SLO\_LCD\_POOLS\_W\_ACCTCD-use to verify the POOLS in the DBT.

SLO\_LCD\_DBT\_COPY\_POSN-use to verify the non-workstudy POSITIONS in the DBT.

SLO\_LCD\_DBT\_COPY\_POSN\_WS\_DIST-use to verify the workstudy POSITIONS in the DBT

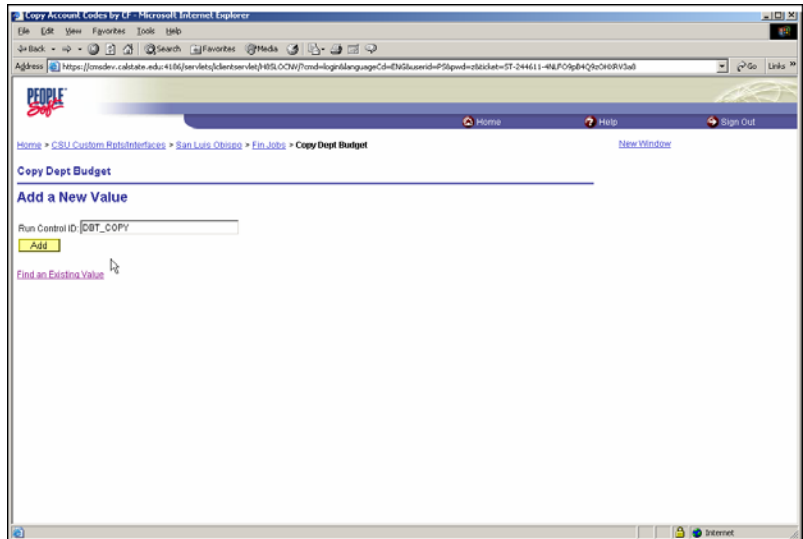
Navigation: [Home](#) > [CSU Custom Rpts/Interfaces](#) > [San Luis Obispo](#) > [Fin Jobs](#) > Copy Dept Budget

1) Click on "Add a New Value" to add a run control.



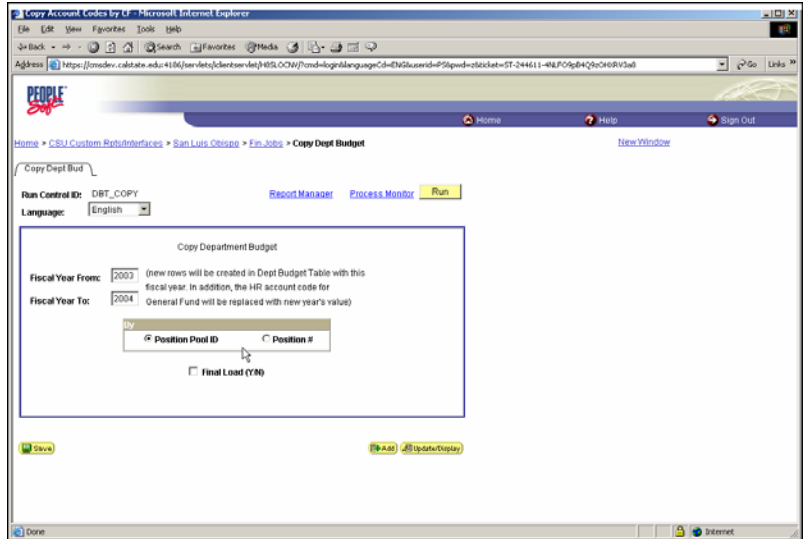
0) Enter the Run Control ID.

1) Click Add.



- 2) The **Copy Dept Budget** page displays.
- 3) Fill in the following
  - ) *System Required Fields:*
    - Fiscal Year From
    - Fiscal Year To
    - By
  - a) *Optional Fields:*
    - Final Load

- 6) Click RUN



### Panel Description

Use the Copy Dept Budget panel to specify the Fiscal Years From and To in which to build new rows in the Department Budget Table for Position Pool or Position level budgets. The Copy Department Budget Table process has an option to run as a report only or to load data. The Final Load indicator is used to specify the run option.

### Field Descriptions

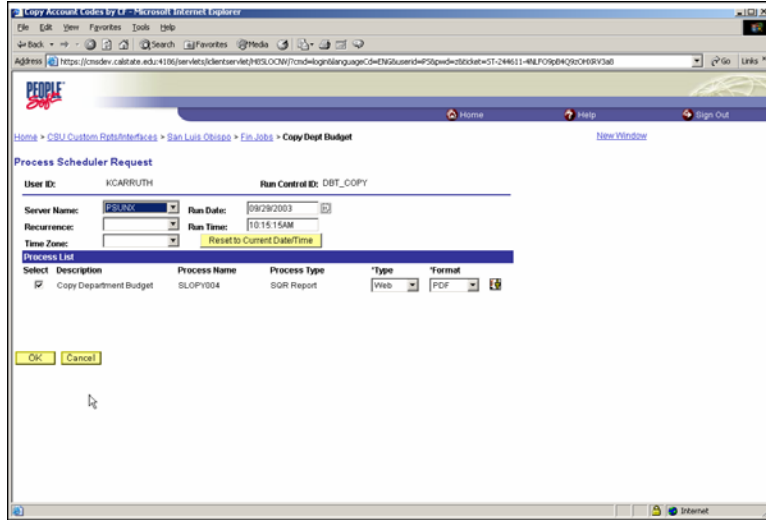
**Fiscal Year From:** Indicate the Fiscal Year in which to copy the Department Budget Table from.

**Fiscal Year To:** Indicate the Fiscal Year in which to copy the Department Budget Table to.

**By:** Indicate the appropriate option. Department Budget records can be copied for Position Pool or Position level budgets only. Only one can be specified at a time.

**Final Load:** Indicate Final Load after initial run has been verified. When Final Load flag is on, the database will be updated based on parameters specified.

- 0) The **Process Scheduler Request** page displays.
- 1) Choose PSUNX for the server and click OK



- 13) The run control page will return.
- 2) To check the process status click the Process Monitor and click REFRESH.

