



## Budget Change Requests

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## Budget Change Requests

### *Advantages of New Process*

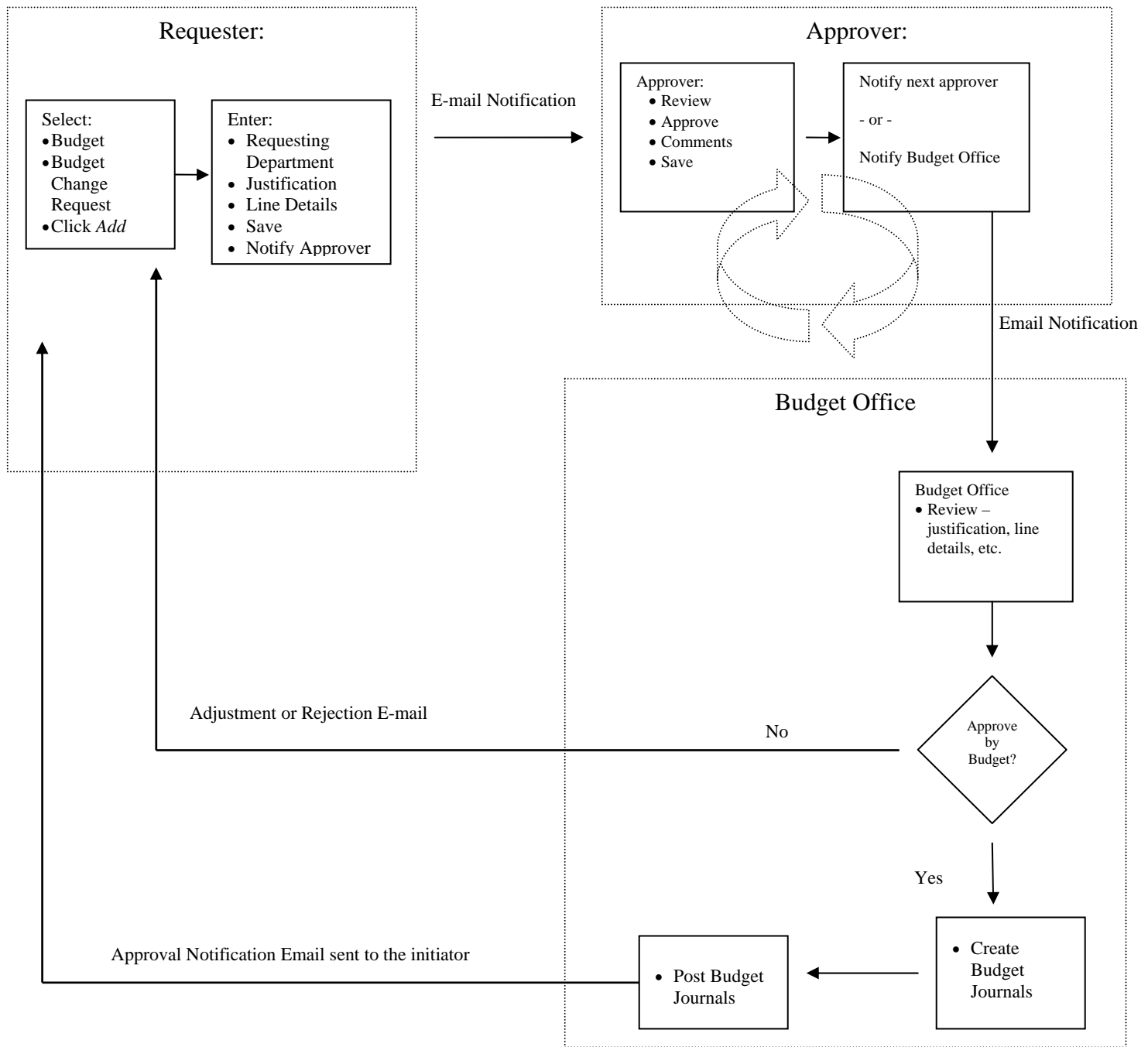
1. More timely processing of change requests on TRAX.  
The information will not have to be processed on a paper document by the department and then the data re-entered by The Budget Office.
2. More complete Information.  
The electronic form requires all necessary information be entered by the end user before the form can be processed.
3. Increased accuracy.  
This new system should eliminate problems deciphering handwriting and correcting mathematical errors. Totals will be generated automatically. Change requests will be more likely to go to the correct department and account.
4. On-line record of budget change requests.  
Departments will have control over the amount of detail displayed on TRAX and the descriptions available.
5. Better security.  
Users will only be allowed to approve transfers from departments they can access on TRAX.
6. Ability to Track Changes  
Users will be able to see an online record of changes that have been made within different departments/accounts. Users will also be able to track approvals and see when a change has been posted.
7. Better Policy Enforcement  
The system will not allow users to enter transactions for accounts that should not be changed.



## *Budget Change Request Policy Notes:*

- This process is a request for transfer of BUDGET funds. Requests will not be granted in violation of policy or without sufficient business reason.
- This is not a Departmental Adjustment! DA's are also available in TRAX, however, they are a request for transfer of ACTUAL funds. Use the departmental adjustment request for interdepartmental charges or to change a transaction that was done incorrectly. The BCR is used to transfer funds BEFORE a charge takes place.
- Follow the approval process of your department or division. The approvers listed on the online BCR form should match what is on your department's Signature Authorization Form. If a BCR is submitted to the Budget Office for final approval without the proper authorization from personnel in your department or division, you will be contacted. This will ultimately slow down the time it takes to approve your request.
- Paper forms will continue to be accepted in certain instances. Examples are grants and sponsored programs, some restricted funds or agency accounts. If you receive an error message in TRAX after entering a certain department ID or account, it may be because the information you are attempting to enter is beyond the scope of the online form. Contact the Budget Office directly if you have questions about how to proceed.
- Do not use this form to move funds within the same account category just to eliminate negative numbers in your Budget Summary. An advantage of TRAX (PeopleSoft) is having the ability to overspend a line item, if you need that flexibility.
- The Budget Office does not budget in cents. Please always round up to the nearest dollar amount.
- Each Request costs about fifty dollars in time and labor to process. Do not move amounts less than one dollar. The sum total for each Request should be at least fifty dollars, if at all possible. Otherwise unrelated charges may be included on one BCR.
- This form will only transfer amounts from Revenue (5XXX) and Expense Accounts (9XXX). Transfers from other account ranges are beyond the scope of this form. For questions, contact the Budget Office (Budget\_Support@baylor.edu).
- You do not need to send any kind of paperwork to the Budget Office. Please do not send detail statements or printed copies of the BCR to them. They will contact you if they need further information regarding your transaction.

## Process for a Budget Change Request



## Entering a Budget Change Request

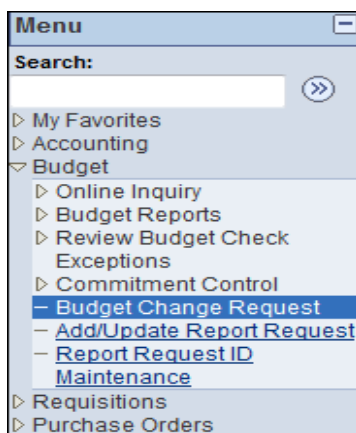
### Example 1:

An unexpected event occurred in Billy Bear's department recently. An electrical storm was responsible for the loss of a couple of computers in the department. Those computers need to be replaced as quickly as possible, but after looking at his budget, Billy Bear finds he does not have sufficient funds in his 97xx accounts. He does have funds, however, in his 93xx accounts. Billy Bear should submit a request to move funds from 93xx to 97xx to cover the cost of the new computers.

### Check the Department Budget

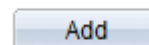
Verify that the department/account has enough money available in its budget to cover the request you are about to submit. TRAX will not check the budget until the Budget Office creates the Budget Journal (BD).

### Enter a Budget Change Request on TRAX



- Select the following from the Menu
  - Budget
    - Budget Change Request

- Click *Add a New Value*
- Click *Add*





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## Budget Change Requests

Online BCR

Business Unit: BEARS Transaction ID: NEXT Transaction Date: 09/02/2010 Document Status:  Void

\*Telephone: 254/710-8704 Entered by: BQB1 Billy Bear Entered on: 09/02/2010  Void

Journal Line Ref: [View printable version](#)

**Budget Approval**

Budget Approval: Pending By on:

Comments

\*Requesting Department \*Apply to Fiscal Year 2011 [Helpful Hints / FAQs](#) [Email Budget Approver](#)

**Requirements to Balance**

The form is balanced.

**Justification (Max 254 Characters)**

**Line Details** First 1 of 1 Last

1 Action: \*Account: \*Amount: + -

\*Department: Fund Code: **Email Approver**

\*Description: (Max 30 Characters) Email Email

**Dept. Head Approval**

Dept. Head Approval: Pending By on

Comments

**Dean Approval**

Dean Approval: Pending By on

Comments

**Vice President Approval**

Vice President Approval: Pending By on

Comments

Save Notify Add Update/Display

### Header Information:

Online BCR

Business Unit: BEARS Transaction ID: NEXT Transaction Date: 09/02/2010 Document Status:  Void

\*Telephone: 254/710-8704 Entered by: BQB1 Billy Bear Entered on: 09/02/2010  Void

Journal Line Ref: [View printable version](#)

[View Printable Version](#)

➤ Click this link for a report of the request

Void

➤ To “delete” the Budget Change Request, click *Void*



Phone: 254/710-8704

- Verify the contact *Phone* number. This should default to the phone number of the person entering the BCR. If the default is incorrect, change the number and send E-mail with the correct phone number to [TRAX@BAYLOR.EDU](mailto:TRAX@BAYLOR.EDU)

## Budget Approval

Budget Approval		
Budget Approval:	Pending	By _____ on: _____
Comments	_____	

- After your BCR is approved by the Budget Office, you will see the status change reflected in this section.

## Requesting Department

\*Requesting Department 0281180

- Enter the primary department ID for the department making the request. Click the magnifying glass to see a list of the departments you have access to.

## Apply To Fiscal Year

\*Apply to Fiscal Year 2011

- This will automatically default to the current fiscal year. It may be necessary in rare instances to change this to an upcoming fiscal year or a previous fiscal year.

## Helpful Hints/FAQ's

[Helpful Hints / FAQs](#)

- This link will take you to the Budget Office's website for many helpful guidelines regarding BCR's.

## Requirements to Balance:

Requirements to Balance
The form is balanced.

- The *Requirements to Balance* area is read-only. It will tell the user what needs to be entered in the bottom part of the form to create a balanced entry.

## Justification:

Justification (Max 254 Characters)
Due to recent storm, we lost 2 computers. Funds in 97xx are not sufficient to cover the cost of replacements. Operational costs are running less than anticipated (93xx).

- Enter a description of the request. This text will be reviewed by the Budget Office. Put in enough detail so they can understand what is going on. Be as clear and concise as possible. A detailed justification must include a thorough explanation of why funds are needed and why the decreasing account can absorb the transfer of funds.

**Note:** Only 254 characters can be entered here! If more than 254 characters are entered, the message below will be displayed and the extra characters will be deleted from the comment.

Windows Internet Explorer	
	The value was too long for the field BB_BCR_HDR.DESCR254_MIXED (labeled 'More Information'). It has been truncated to 254 characters. (126,141)
A long edit box on the page allows essentially unlimited text, but the record field specified that the field is of fixed length. You entered a value longer than that limitation, so the value has been truncated to fit the record field.	
<input type="button" value="OK"/>	



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## Budget Change Requests

### Line Details:

Line Details First 1 of 1 Last

1 Action:  \*Account:  \*Amount:

\*Department:  Fund Code:  Email Approver

\*Description:  (Max 30 Characters) Email

**Dept. Head Approval**

Dept. Head Approval  Pending  on

Comments

**Dean Approval**

Dean Approval  Pending  on

Comments

**Vice President Approval**

Vice President Approval  Pending  on

Comments

\*Action:

- Select Action:  
To move funds TO an expense account (9XXX), select Increase.

\*Account:

- Enter the *Account*. Only Revenue and Expense accounts may be used. Revenue accounts start with “5”. Expense Accounts start with a “9”. You will receive an error message if you attempt to use an invalid account.

\*Amount:

- Enter the total *Amount* to be changed.

\*Department:

- Enter the *Department*.

\*Description:

- Enter a *Description* for the transaction. When the BD is created the characters “BCR” (Budget Change Request) and the BCR Transaction ID will be added to the front of the description. (“Repl comp....” becomes “BCR10020-Repl comp....”)



- Click *Add a New Row* to create the “from” row.

2    Action: Decrease    \*Account: 9370    \*Amount: 2000.00  
 \*Department: 0281180    Fund Code: 10111  
 \*Description: Repl comp - Lady and Joy

Email Approver  
 Email [ ] Email

Action: Decrease

- Select Action:  
To move funds OUT OF an expense account (9XXX), select Decrease.

\*Account: 9370

- Enter the *Account*.

\*Amount: 2000.00

- Enter the total *Amount* to be changed.

\*Department: 0281180

- Enter the *Department*.

\*Description: Repl comp - Lady and Joy

- Enter a *Description* for the transaction.  
When the BD is created the characters “BCR” (Budget Change Request) and the BCR Transaction ID will be added to the front of the description. (“Repl comp....” becomes “BCR10020-Repl comp....”)

Save

- Click *Save*

## Emailing the Approver (if necessary):

The best way to notify an approver of an Budget Change Request that they need to approve is to use TRAX to send them an email.

- Click Look up Email (the magnifying glass).

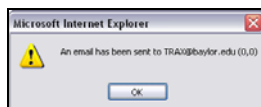
User ID	First Name	Last Name	Email ID
AE41	Amy	Alexander	Amy_E_Alexander@baylor.edu
AEH1	Anna E.	Henderson	Anna_Henderson@baylor.edu
BCS1	Bob C.	Spence	Bob_Spence@baylor.edu
BLK1	Rebecca L.	Kino	Becky_Kino@baylor.edu
BLW1	Barbara L.	Wolff	Barbara_Wolff@baylor.edu
BQB1	Billy (Test User)	Bear	TRAX@baylor.edu
BQB2	Billy (Test User)	Bear	TRAX@baylor.edu
BQB3	Billy (Test User)	Bear	TRAX@baylor.edu
BQB4	Billy (Test User)	Bear	TRAX@baylor.edu
BQB5	Billy (Test User)	Bear	TRAX@baylor.edu
BQB6	Billy (Test User)	Bear	TRAX@baylor.edu
BWN1	Brian W.	Nicholson	Brian_Nicholson@baylor.edu
DLW1	Debbie L.	Williams	Debbie_Williams@baylor.edu
GDB1	Grady D.	Bauby	Don_Bauby@baylor.edu

- Select the appropriate *User ID*

**Note:** Only users who have security access to approve BCR's and have security access to view budgets for the department on the line will show up in this list. In this example, we are working with one department ID. As a result, it is possible for us to have a total of 3 different approvers. Each of these approvers will set the approval flag for two lines. If you need to notify someone who is not on the list or you do not know who your approvers are, use regular e-mail to have them contact [TRAX@Baylor.edu](mailto:TRAX@Baylor.edu).

- The address will show up in the *Email* field

- Click *Email*



- A message will be displayed confirming the Email has been sent. The user does not need to click *Save* in order to send the Email.



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*Budget Change Requests*

\*Note – See page 19 for Approval instructions.



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Budget Change Requests

## (Optional) Print Budget Change Request:

Print a copy of the Budget Change Request for the department records.

[View printable version](#)

- Click *View Printable Version* to see the Budget Change Request Report. The Request cannot be printed until it has been saved.

Date: 2/22/2009  
Report ID: BB\_OLBCR

**BAYLOR**  
UNIVERSITY

Budget Change Request

**Transaction ID:** 10001  
**Transaction Date:** 2/22/2009  
**Entered By:** Amy Alexander  
**Entered On:** 2/22/2009  
**Phone:** 254/710-9705  
**JV Line Ref:**  
**Description:** An electrical storm recently caused damage to computers in our department. We need to replace these ASAP. Please move funds from 9370 to 9705 so that we can cover the cost of these computers.

BUDGET APPROVAL INFORMATION	
Approval Status:	Pending
Approved By:	
Approved On:	
Accounting Date:	

BUDGET CHANGE REQUEST LINES						
Line	Action	Department	Account	Fund	Line Description	Amount
1	Increase	0281180 - ITS-Information Systems & Svcs	9705 - Equipment	10111	Repl comp - Lady and Joy	2,000.00
2	Decrease	0281180 - ITS-Information Systems & Svcs	9370 - Supplies	10111	Repl comp - Lady and Joy	-2,000.00



- Click the Adobe *Print* button to send to the printer

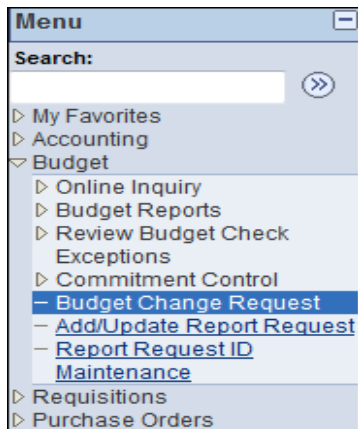


- Click *Exit* to Close the window

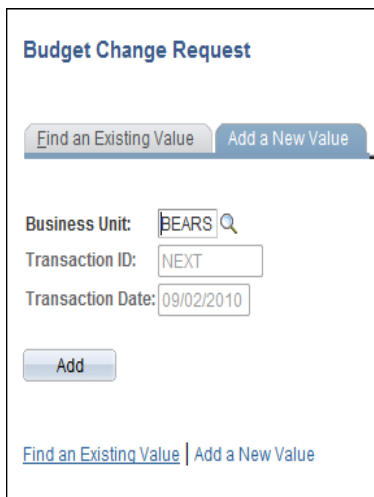
*Example 2: Interdepartmental Budget Change Request*

Billy Bear from the Theater Arts department would like to use funds from his restricted fund for the purchase of some new projectors. To do that, he needs to coordinate with the College of Arts and Sciences Technology Center. In this example, we will move funds out of the restricted fund and into the College of Arts and Sciences Technology Center's operating budget.

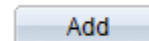
*Enter a Budget Change Request in TRAX*



- Select the following from the Menu
  - Budget
    - Budget Change Request



- Click Add





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## Budget Change Requests

### Header Information:

Online BCR			
Business Unit: BEARS	Transaction ID: NEXT	Transaction Date: 09/02/2010	Document Status: O
*Telephone: 254/710-8704	Entered by: BQB1 Billy Bear	Entered on: 09/02/2010	<input type="checkbox"/> Void
Journal Line Ref:		<a href="#">View printable version</a>	

[View Printable Version](#)

➤ Click this link for a report of the request

Void

➤ To “delete” the Budget Change Request, click *Void*

Phone: 254/710-8704

➤ Verify the contact *Phone* number. This should default to the phone number of the person entering the BCR. If the default is incorrect, change the number and send E-mail with the correct phone number to [TRAX@BAYLOR.EDU](mailto:TRAX@BAYLOR.EDU)

### Budget Approval

Budget Approval		
Budget Approval: Pending	By	on:
Comments		

➤ After your BCR is approved by the Budget Office, you will see the status change reflected in this section.

### Requesting Department

\*Requesting Department 0324375

➤ Enter the primary department ID for the department making the request. Click the magnifying glass to see a list of the departments you have access to.

### Apply To Fiscal Year

\*Apply to Fiscal Year 2011

➤ This will automatically default to the current fiscal year. It may be necessary in rare instances to change this to an upcoming fiscal year or a previous

fiscal year.

## Helpful Hints/FAQ's

[Helpful Hints / FAQs](#)

- This link will take you to the Budget Office's website for many helpful guidelines regarding BCR's.

## Requirements to Balance:

Requirements to Balance

The form is balanced.

- The *Requirements to Balance* area is read-only. It will tell the user what needs to be entered in the bottom part of the form to create a balanced entry.

## Justification:

Justification (Max 254 Characters)

Application of funds to College of Arts and Sciences Technology Center for purchase of new projector. Restricted fund has a sufficient balance, and this purpose is an allowable use of these funds.

- Enter a description of the request. This text will be reviewed by the Budget Office. Put in enough detail so they can understand what is going on. Be as clear and concise as possible. A detailed justification must include a thorough explanation of why funds are needed and why the decreasing account can absorb the transfer of funds.

**Note:** Only 254 characters can be entered here! If more than 254 characters are entered, the message below will be displayed and the extra characters will be deleted from the comment.

Windows Internet Explorer



The value was too long for the field BB\_BCR\_HDR.DESCR254\_MIXED (labeled 'More Information'). It has been truncated to 254 characters. (126,141)

A long edit box on the page allows essentially unlimited text, but the record field specified that the field is of fixed length. You entered a value longer than that limitation, so the value has been truncated to fit the record field.

OK



## Line Details:

Line Details		First	1 of 1	Last
1	Action: <input type="text"/>	*Account: <input type="text"/>	*Amount: <input type="text"/>	
	*Department: <input type="text"/>	Fund Code: <input type="text"/>	Email Approver	
	*Description: <input type="text"/> (Max 30 Characters)		Email: <input type="text"/>	Email
<b>Dept. Head Approval</b>				
Dept. Head Approval	<input type="text"/>	By	on	
Comments <input type="text"/>				
<b>Dean Approval</b>				
Dean Approval	<input type="text"/>	By	on	
Comments <input type="text"/>				
<b>Vice President Approval</b>				
Vice President Approval	<input type="text"/>	By	on	
Comments <input type="text"/>				

Action:

- Select Action:  
To move funds TO an expense account (9XXX), select Increase.

\*Account:

- Enter the *Account*. Only Revenue and Expense accounts may be used. Revenue accounts start with "5". Expense Accounts start with a "9". You will receive an error message if you attempt to use an invalid account.

\*Amount:

- Enter the total *Amount* to be changed.

\*Department:

- Enter the *Department*.

\*Description:

- Enter a *Description* for the transaction. When the BD is created the characters "BCR" (Budget Change Request) and the BCR Transaction ID will be added to the front of the description. ("Repl comp...." becomes "BCR10020-Repl comp....")



- Click *Add a New Row* to create the “from” row.

Action:

- Select Action:  
To move funds OUT OF an expense account (9XXX), select Decrease.

\*Account:

- Enter the *Account*.

\*Department:

- Enter the total *Amount* to be changed.

\*Department:

- Enter the *Department*.

\*Description:

- Enter a *Description* for the transaction.  
When the BD is created the characters “BCR” (Budget Change Request) and the BCR Transaction ID will be added to the front of the description. (“Repl comp....” becomes “BCR10020-Repl comp....”)



- Click *Save*

\*Note – See page 12 for printing instructions.

## Emailing the Approver (if necessary):

The best way to notify an approver of an Budget Change Request that they need to approve is to use TRAX to send them an email.

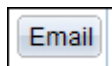
- Click Look up Email (the magnifying glass).

User ID	First Name	Last Name	Email ID
AE41	Amy	Alexander	Amy_E_Alexander@baylor.edu
AEH1	Anna E.	Henderson	Anna_Henderson@baylor.edu
BCS1	Bob C.	Spence	Bob_Spence@baylor.edu
BLK1	Rebecca L.	Kino	Becky_Kino@baylor.edu
BLW1	Barbara L.	Wolff	Barbara_Wolff@baylor.edu
BQB1	Billy (Test User)	Bear	TRAX@baylor.edu
BQB2	Billy (Test User)	Bear	TRAX@baylor.edu
BQB3	Billy (Test User)	Bear	TRAX@baylor.edu
BQB4	Billy (Test User)	Bear	TRAX@baylor.edu
BQB5	Billy (Test User)	Bear	TRAX@baylor.edu
BQB6	Billy (Test User)	Bear	TRAX@baylor.edu
BWN1	Brian W.	Nicholson	Brian_Nicholson@baylor.edu
DLW1	Debbie L.	Williams	Debbie_Williams@baylor.edu
GDB1	Grady D.	Bauby	Don_Bauby@baylor.edu

- Select the appropriate *User ID*

**Note:** Only users who have security access to approve BCR's and have security access to view budgets for the department on the line will show up in this list. In this example, because we are working with two distinctly separate departments, it is possible to have up to 6 different approvers on this transaction. Therefore, the approval step could repeat numerous times. If you need to notify someone who is not on the list or you do not know who your approvers are, use regular e-mail to have them contact [TRAX@Baylor.edu](mailto:TRAX@Baylor.edu).

- The address will show up in the *Email* field



- Click *Email*



- A message will be displayed confirming the Email has been sent. The user does not need to click *Save* in order to send the Email.



## Approval:

Some TRAX users will only be able to enter BCR lines and will not be able to approve them. TRAX users who have BCR Approval access can only approve for departments in their security access. As an approver, you should verify that the department has enough money available in its budget to cover the change. TRAX will not check the budget until The Budget Office creates the BD.

The person reviewing the transaction should review all lines to ensure the request is accurate. Make changes, if necessary, and save. When ready, the approver will select the appropriate choice (approved or denied) from the drop-down box under the BCR Approvals section.

Approvers will receive an email similar to the one below.

**From:** Billy\_Bear@baylor.edu [mailto: Billy\_Bear@baylor.edu]  
**Subject:** Budget Change Request Number 18 needs your approval.

BCR Number 11059 needs your approval. Please click on the link below to access this transaction:

[http://orasoft.baylor.edu/8096/psp/fsprd/EMPLOYEE/ERP/c/BB\\_BAYLOR\\_APPS.BB\\_ONLINE\\_BCR.gbl?Page=BB\\_ONLINE\\_BCR&BUSINESS\\_UNIT=BEARS&TRANSACTION\\_DT=2010-08-26&TRANSACTION\\_ID=11058&Action=T](http://orasoft.baylor.edu/8096/psp/fsprd/EMPLOYEE/ERP/c/BB_BAYLOR_APPS.BB_ONLINE_BCR.gbl?Page=BB_ONLINE_BCR&BUSINESS_UNIT=BEARS&TRANSACTION_DT=2010-08-26&TRANSACTION_ID=11058&Action=T)

Thank you,

Billy Bear

[http://psds.baylor.edu:80926&TRANSACTION\\_ID=11058&Ac](http://psds.baylor.edu:80926&TRANSACTION_ID=11058&Ac)

➤ Click the link in the email

User ID:	<input type="text" value="BQB2"/>
Password:	<input type="password" value="••••••••"/>
<input type="button" value="Sign In"/>	

➤ Enter the *User ID*

➤ Enter the *Password*

➤ Click *Sign In*

<b>Dept. Head Approval</b>			
Dept. Head Approval	Approved	By BQB1 Billy Bear	on 09/02/2010
Comments			
<b>Dean Approval</b>			
Dean Approval	Pending	By	on
Comments			
<b>Vice President Approval</b>			
Vice President Approval	Pending	By	on
Comments			

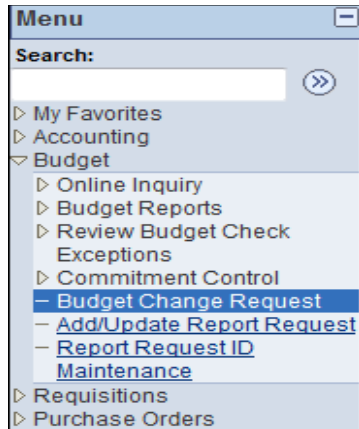
Dept. Head Approval

- There are three possible levels of approval for each line in your request – Department Head, Dean, and Vice President. Follow the rules and policies of your department and/or division and set the approval flags accordingly. The Budget Office will review these to ensure the approvals have been done in accordance with policy. NOTE – In the first example, the approvers will be from the same department/division and you can have up to 3 possible approvers who will each be approving 2 lines. In the second example, the approvers will be from different departments and you can have up to 6 different approvers who will approve the line that is relevant to their department.

- Make sure all changes have been made and click *Save*. At this point, the request can be forwarded to the next approver (if needed; repeat steps on page 11 and 18).

- **IMPORTANT!** The final approver will need to notify the Budget Office that the BCR is ready for review. If you do not click this button, the Budget Office will not know your BCR is ready for review and this could cause substantial delays to the processing of your request.
- It will still be two to four business days before this transaction shows up in the department budget.

## Finding a Budget Change Request



- Select the following from the Menu
  - Budget
  - Budget Change Request

Find an Existing Value

- Click *Find an Existing Value*

Find an Existing Value

Add a New Value

Maximum number of rows to return (up to 300):

**Business Unit:** begins with

**Transaction ID:** begins with

**Transaction Date:** =

**Entered by:** begins with

**Entered on:** =

**All Lines Approved:** =

**Approval Status:** =

**Approval User Id:** begins with

**Receipt Flag:** =

**Journal Line Reference:** begins with

Case Sensitive

[Basic Search](#)

[Save Search Criteria](#)

Use any of the fields listed above to find the BCR you are looking for. *Transaction Date* and *Entered By* can be helpful to use if you know who entered it or when it was entered.

**Transaction Date:**

- *Transaction Date*  
Typically, is the date the Request was entered.



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## Budget Change Requests

### Entered by:

BQB1

- *Entered By*  
TRAX User ID of the person who initiated the BCR

Search

- Click *Search* to display BCRs that meet the search criteria

Search Results											
View All									First	1-7 of 7	Last
Business Unit	Transaction ID	Transaction Date	Entered by	Entered on	All Lines Approved	Approval Status	Approval User Id	Receipt Flag	Journal Line Reference		
BEARS	11058	08/26/2010	BQB1	08/26/2010	Yes	Approved	AEA1	Posted	BCR0016205		
BEARS	11059	08/26/2010	BQB1	08/26/2010	Yes	Pending	(blank)	Open	(blank)		
BEARS	11060	08/26/2010	BQB1	08/26/2010	Yes	Pending	(blank)	Open	(blank)		
BEARS	11061	08/26/2010	BQB1	08/26/2010	No	Pending	(blank)	Open	(blank)		
BEARS	11062	08/26/2010	BQB1	08/26/2010	No	Pending	(blank)	Open	(blank)		
BEARS	11063	08/26/2010	BQB1	08/26/2010	Yes	Approved	AEA1	Posted	BCR0016206		
BEARS	11064	08/26/2010	BQB1	08/26/2010	Yes	Approved	AEA1	Posted	BCR0016207		

Transaction ID  
11058

- Click on any column in the row to select the desired BCR

### Page Navigation Buttons after a Search:

Return to Search

- *Return to Search* – Go back to the search page

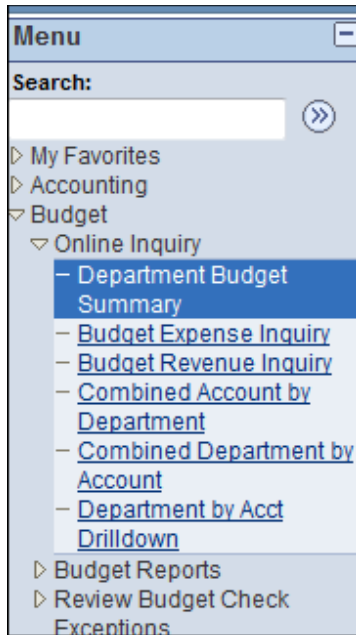
Previous in List

- *Previous in List* – Displays the previous row of data

Next in List

- *Next in List* – Displays the next row of data

## Viewing a BCR in your Budget



- Select the following from the Menu
  - Budget
    - Online Inquiry
      - Department Budget Summary

Find an Existing Value

Maximum number of rows to return (up to 300):

Business Unit: begins with

Department:

Budget Period: begins with

[Basic Search](#)

- Enter Department
  - Enter Budget Period
    - Click Search



# BAYLOR



## Budget Change Requests

BB Budget Inquiry   9XXX Subtotals   93XX Subtotals   Subaccounts

**Inquiry Results**  
[Print Budget Report](#)  
 Business Unit: BEARS   Budget Period: 2011   Fund: 10111  
 Department Code: 0281180   Independence Institute

Budget Totals					
	Budget	Requisition	Purchase Order	Actual	Balance
Revenues	0.00			0.00	0.00
Expenses	4,119,392.00	100.00	10,789.58	999,888.34	3,108,614.08
Net	-4,119,392.00			-999,888.34	

Acct	Description	Budget	Requisition	Purchase Order	Actuals	Balance
9120	Full Time Regular Employee	<u>2,024,244.00</u>	-	-	<u>336,185.78</u>	1,688,058.22
9130	Part-Time Regular	<u>28,925.00</u>	-	-	<u>4,820.78</u>	24,104.22
9189	Tuition Allowance -- Personnel	-	-	-	<u>42,475.60</u>	-42,475.60
9190	Budget Fringe Benefits	<u>600,393.00</u>	-	-	-	600,393.00
9195	Group Insurance Plans Distr	-	-	-	<u>34,454.85</u>	-34,454.85
9197	Retirement	-	-	-	<u>36,828.69</u>	-36,828.69
9198	Social Security	-	-	-	<u>24,501.91</u>	-24,501.91
9199	Other Fringe Benefits	<u>1,311.00</u>	-	-	<u>888.65</u>	442.35
9318	Contract Services	<u>1,278,907.00</u>	-	<u>6,389.58</u>	<u>500,251.48</u>	772,265.94
9340	Honorarium & Professional Fees	<u>39,200.00</u>	-	<u>4,400.00</u>	-	34,800.00
9342	Guests & Entertainment	<u>66.00</u>	-	-	-	66.00
9358	Memberships	<u>10,079.00</u>	-	-	<u>4,355.00</u>	5,724.00
9359	Postage	<u>279.00</u>	-	-	-	279.00
9360	Repairs and Maintenance	<u>3,238.00</u>	-	-	-	3,238.00
9370	Supplies	<u>27,667.00</u>	-	-	<u>1,489.48</u>	26,177.52
9371	Duplicating/Copier Services	<u>1,701.00</u>	-	-	<u>286.15</u>	1,414.85
9376	Telephone Expense	<u>18,350.00</u>	-	-	<u>2,362.07</u>	15,987.93
9380	Vehicle Costs	<u>1,950.00</u>	-	-	-	1,950.00

2,000.00

- *Drill Down* on the amount to view the *Budget Expense Inquiry*. A new window will open and you will see a record of the BCR.



# BAYLOR



Budget Change Requests

Budget Requisitions Purchase Orders Expended

[Print Report](#)

**Business Unit** BEARS      **Fund Code** 10111      **Budget Period** 2011

**Department** 0281180      Independence Institute

**Account** 9370      Supplies

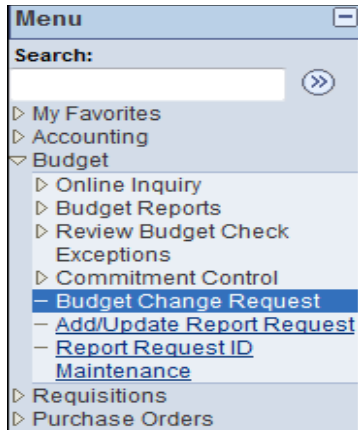
**Total Budget:** 25,667.00

Journal ID	Journal Date	Amount	Journal Line Description
1 1000613497	06/01/2010	27,666.00	ESTABLISH ORIGINAL BUDGET
2 BCR0016522	08/01/2010	1.00	BCR11298-Line 2
3 BCR0016523	09/02/2010	-2,000.00	BCR11299-Repl Comp - Lady and

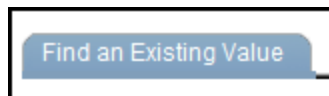
**Journal Line Description**  
BCR10001-Repl comp - Lady and

- The Journal Line Description shows the BCR transaction number, along with the first 20 characters of the description.

## Voiding a Budget Change Request



- Select the following from the Menu
  - Budget
    - Budget Change Request



- Click *Find an Existing Value*

Online BCR

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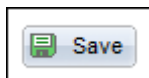
Business Unit: BEARS    Transaction ID: NEXT    Transaction Date: 09/02/2010    Document Status: O

\*Telephone: 254/710-8704    Entered by: BQB1    Billy Bear    Entered on: 09/02/2010     Void

Journal Line Ref:    [View printable version](#)



- Click *Void*



- Click *Save*
- The page will be grayed out.



# BAYLOR



*Budget Change Requests*

**Notes:**