MANAGE CONTROL BUDGETS

QUICK REFERENCE GUIDE BUD-23

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to manage control budgets in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the explanation on how to manage control budgets in NCFS which enables the user to close control budget for use, process accounting hierarchies for budgetary control, run refresh control budgets scheduled process, and prepare control budget for use.

Close Control Budget for Use

To manage control budgets in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.

2. On the **Home** page, click the **Budgetary Control** tab.

3. Click the **Budgetary Control** app.
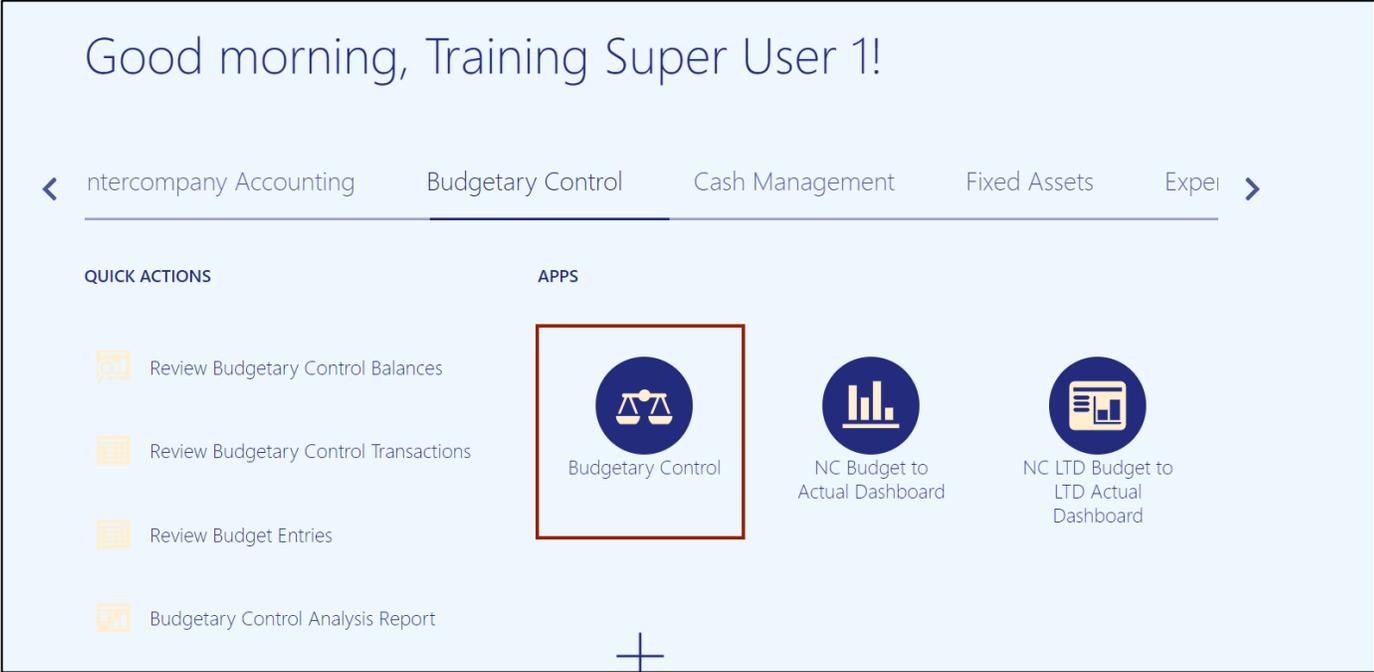
4. From the **Budgetary Control Dashboard** page, click the **Tasks** icon.

5. Under **Budget**, click **Manage Control Budgets.**

6. Click the existing control budget.

   In this example, we choose **NC Agency to Account Advisory CB.**

7. Click the **Action** drop-down choice list.

8. Select **Close** option.
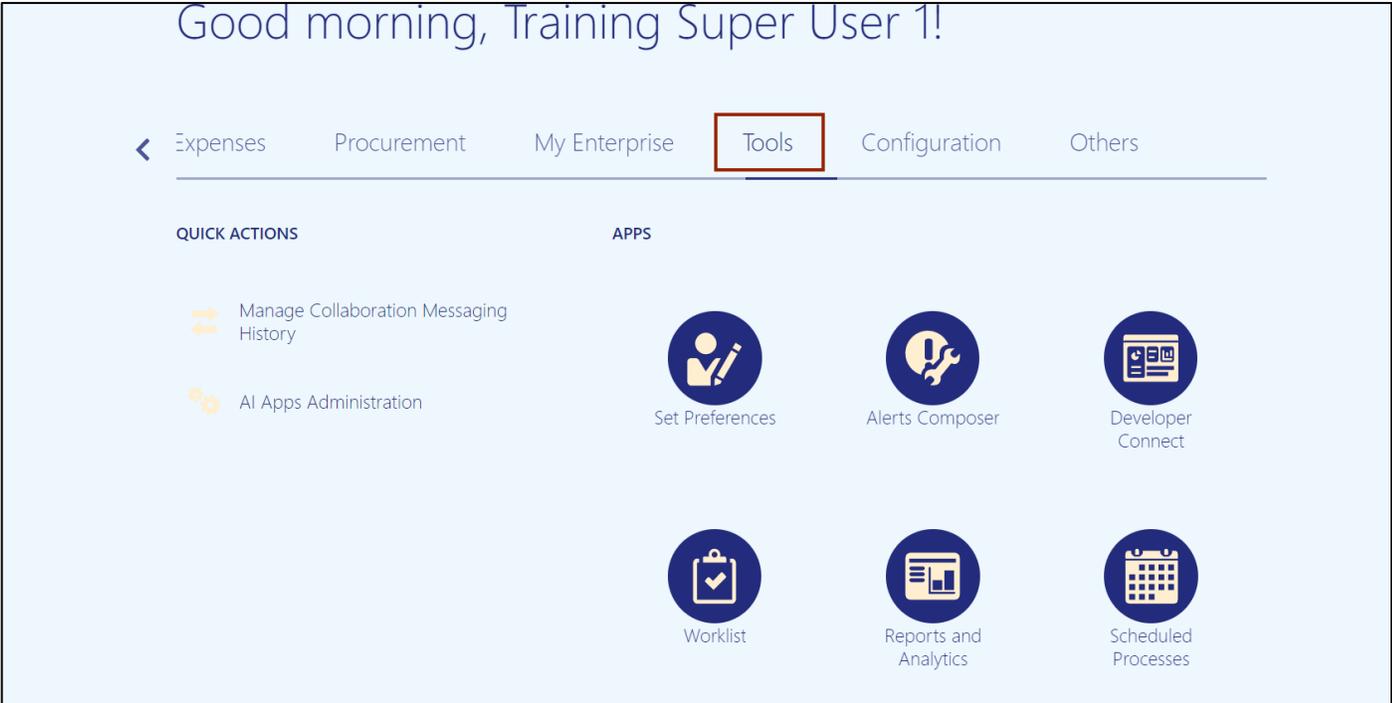
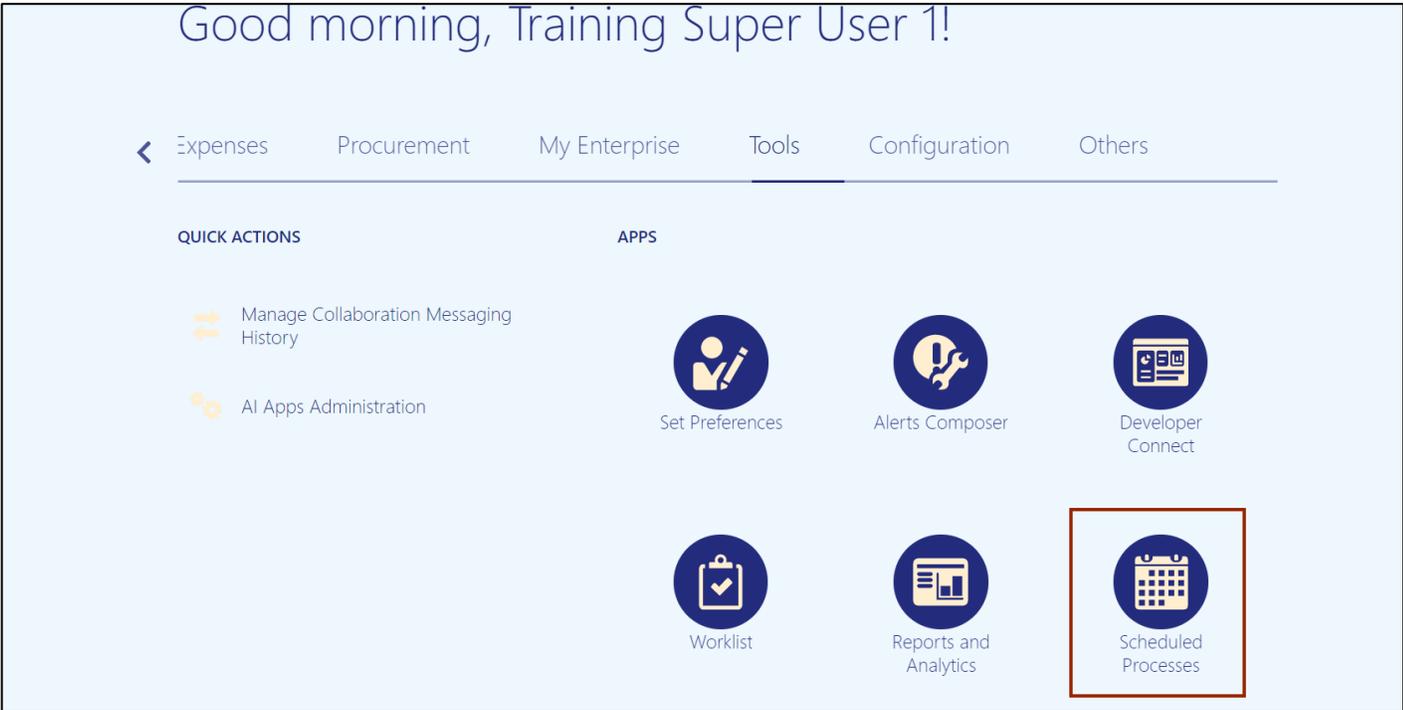9. The **Warning** pop-up will appear, click the **Yes** button.
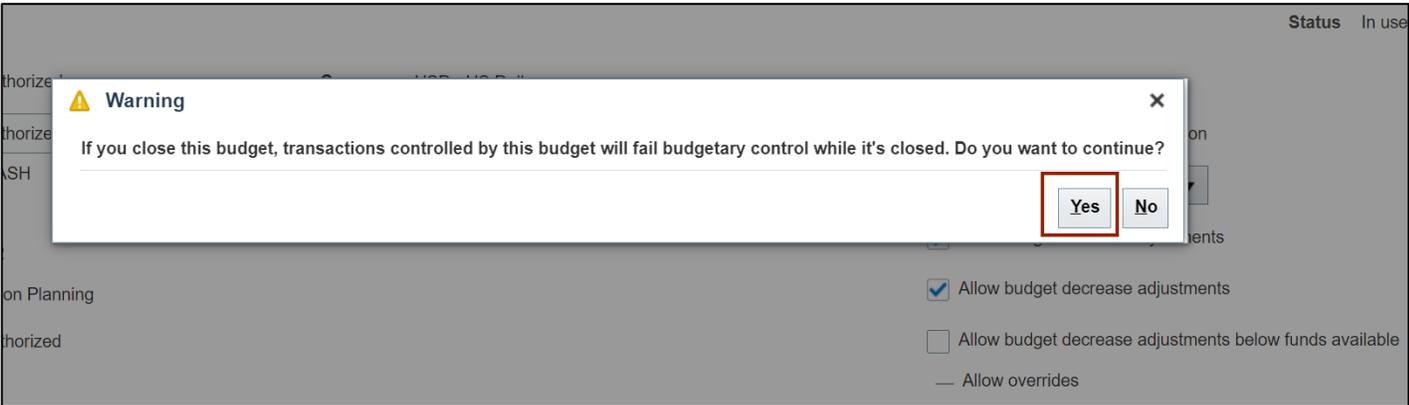
Process Accounting Hierarchies for Budgetary Control

1. Navigate to **Home** page and then click the **Tools** tab.

2. Click the **Scheduled Processes** app.

3. Click the **Schedule New Process** button.

4. Click the **Arrow** [▾] icon.

Schedule New Process

Type ● Job   ○ Job Set

Name

Description

OK   Cancel

5. Click the **Search** link.

Evaluate Absences: Subprocess

Process Events

Process Events: Subprocess

Migrate Previous Versions of Absence Data

Dependent Job

Advanced Controls Notifications

Update Accrual Plan Enrollments

Update Accrual Plan Enrollments: Subprocess

Calculate Accruals and Balances

Calculate Accrual and Balances: Subprocess

Search...

OK   Cancel
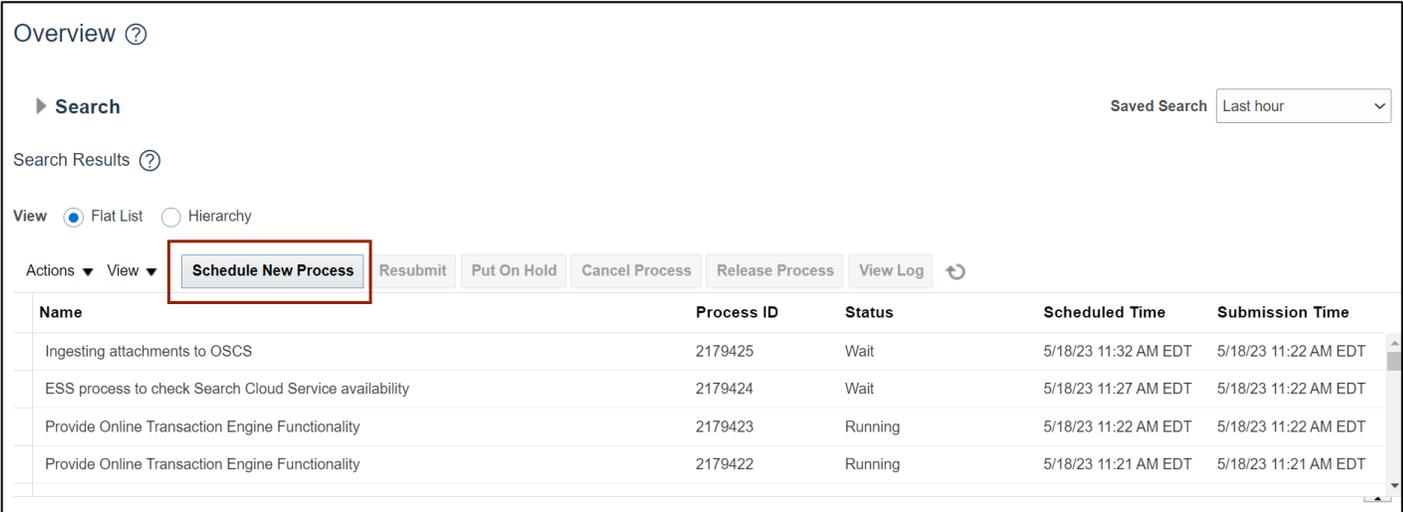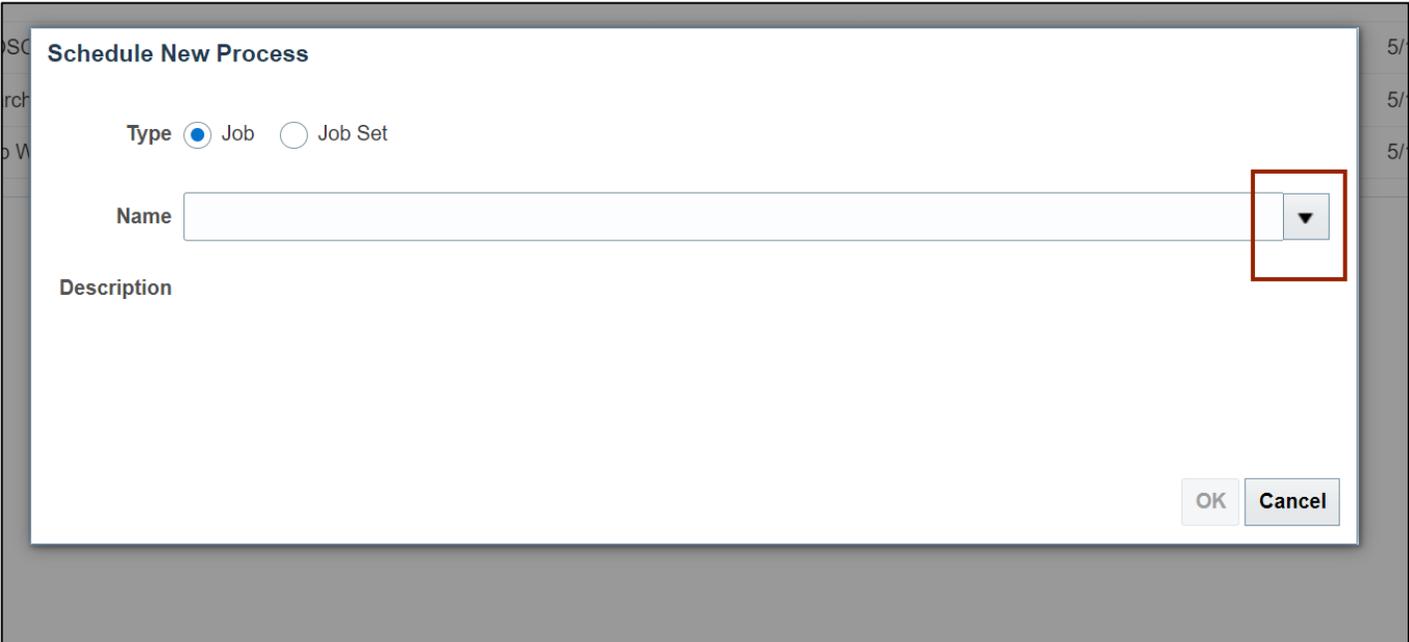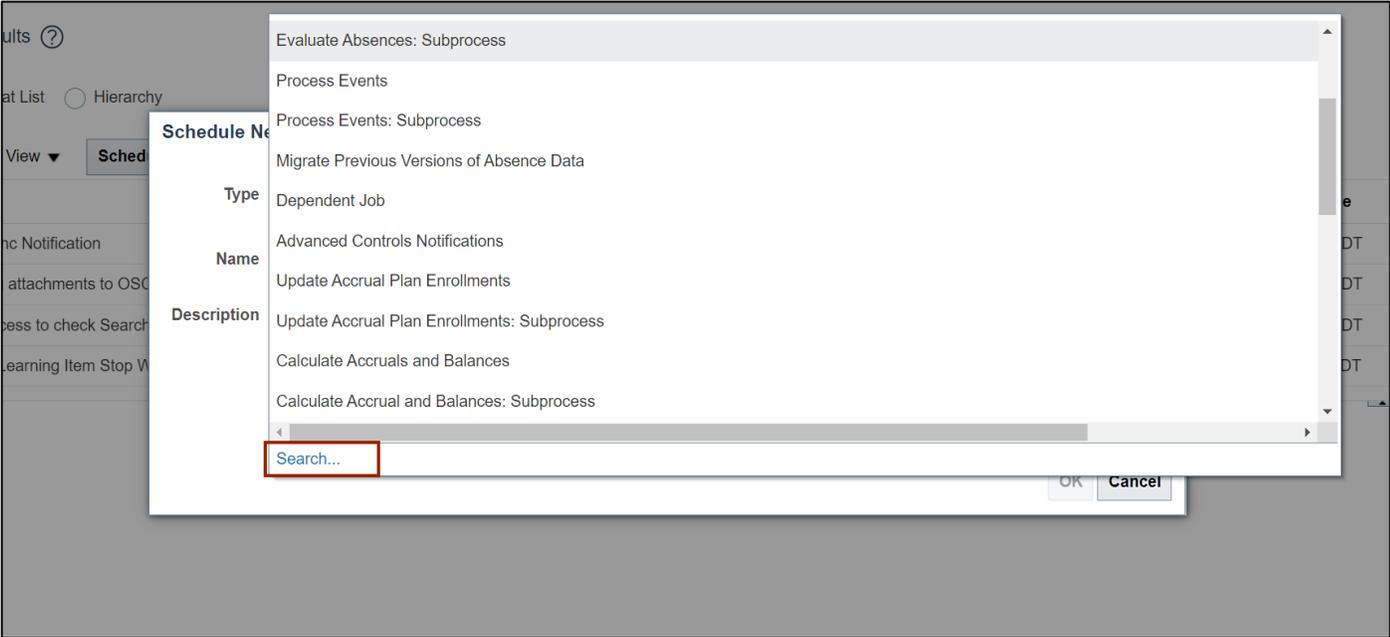
6. In the *Name* field, Enter **process account hierarchies.**
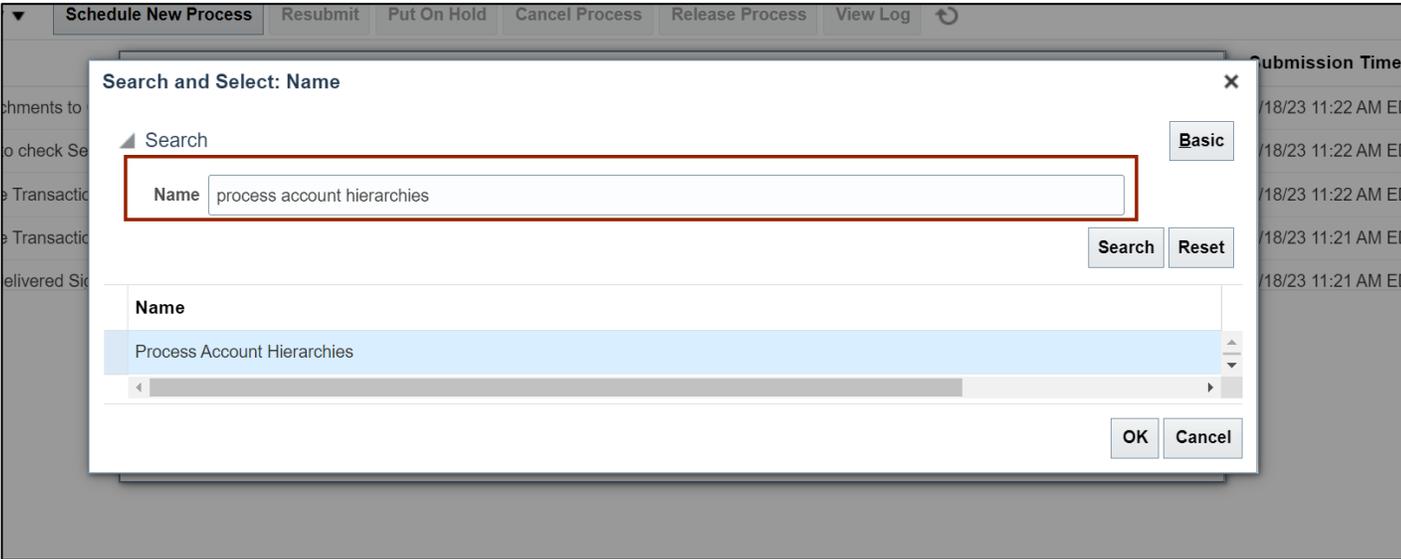
7. Click the **Search** button.

8. Select the **Process Account Hierarchies** from the result section.

9. Click the **OK** button.

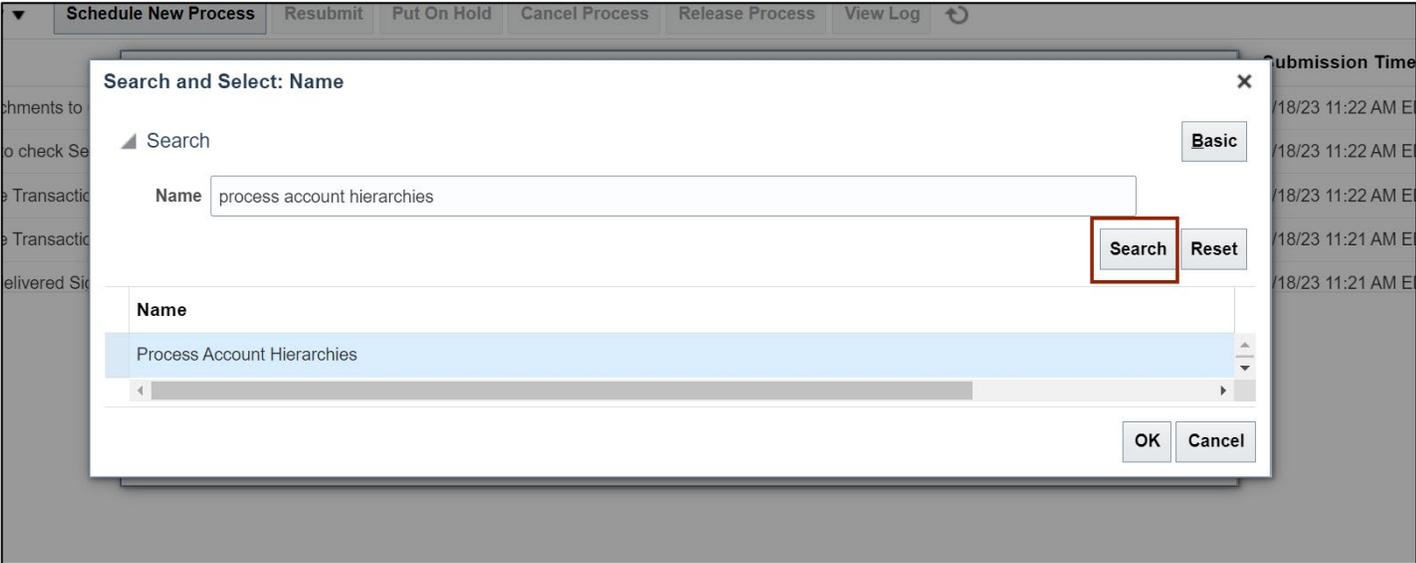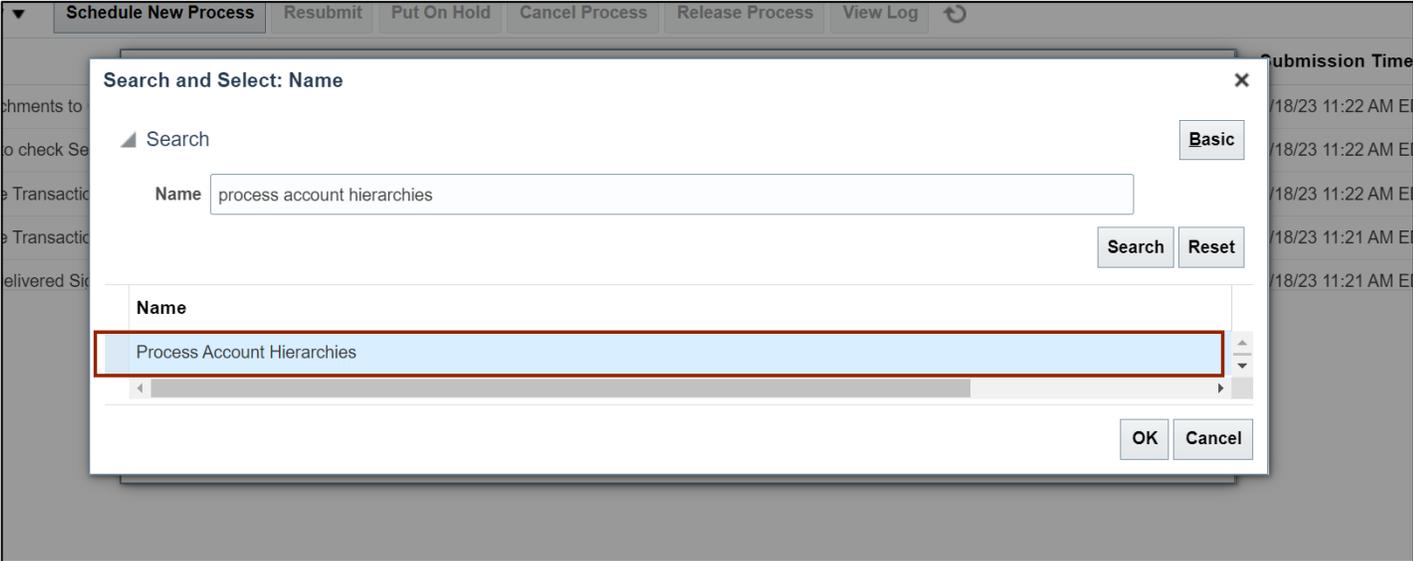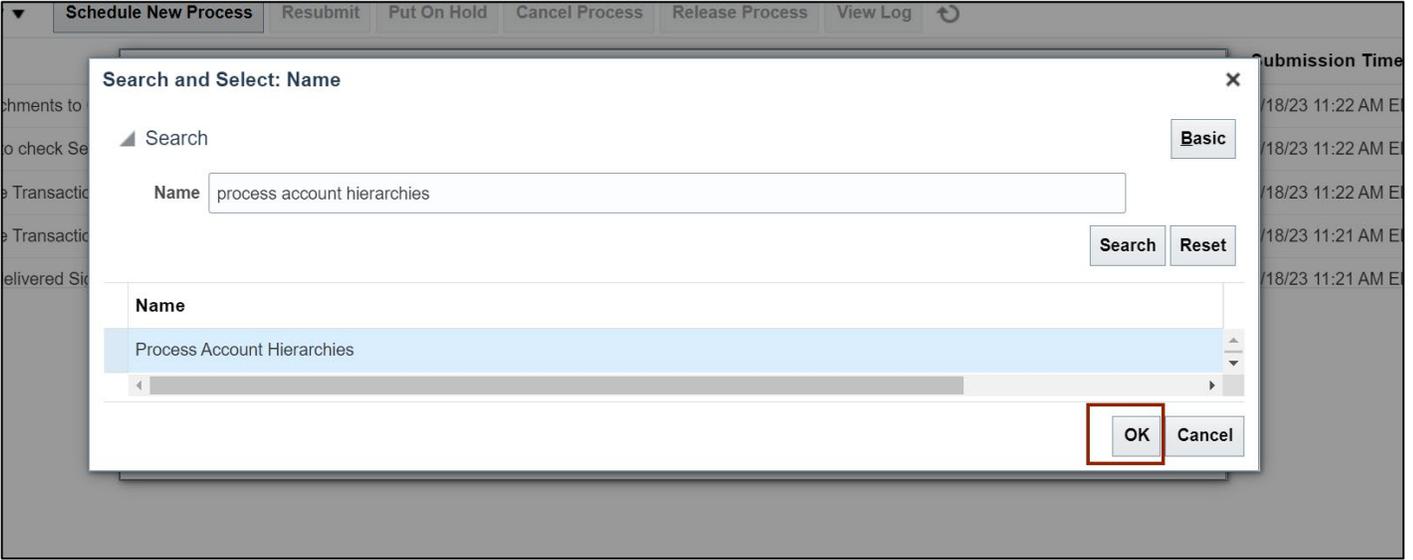10. The **Process Account Hierarchies** is updated in the *Name* field, Click the **OK** button.

Schedule New Process

Type ⦿ Job ◯ Job Set

Name Process Account Hierarchies ▼

Description Submits account hierarchies related processes including row flattening, column flattening, tree audit, tree activation, maintain value sets process, maintain account hierarchies process, and publish hierarchies process.

OK   Cancel

11. Enter the required parameters.

Process Details ✕

ⓘ This process will be queued up for submission at position 1

Process Options   Advanced   Submit   Cancel

Name Process Account Hierarchies

Description Submits account hierarchies related processes i... ☐ Notify me when this process ends

Schedule As soon as possible Submission Notes

Basic Options

Parameters

* Value Set   Account NC CASH Account NC CASH ⌄

Tree Name   Account NC CASH Account NC CASH ⌄

Tree Version Name   Account NC CASH Current Account NC CASH Current ⌄

Publish Hierarchies   Yes ⌄

NCFS

12. Click the **Submit** button.

Process Details   ✕

ⓘ This process will be queued up for submission at position 1

[Process Options] [Advanced] [**Submit**] [Cancel]

Name Process Account Hierarchies

Description Submits account hierarchies related processes i...   ☐ Notify me when this process ends

Schedule As soon as possible   **Submission Notes** [   ]

Basic Options

Parameters

* **Value Set** [Account NC CASH Account NC CASH   ⌄]

Tree Name [Account NC CASH Account NC CASH   ⌄]

Tree Version Name [Account NC CASH Current Account NC CASH Current   ⌄]

Publish Hierarchies [Yes ⌄]

13. The **Confirmation** pop-up appears, Click the **OK** button.

...ss will be queued up for submission at position 1

[Process Options] [Advanced] [Submit] [Cancel]

Confirmation

Process Account Hierarchies

Submits account hierarchies related processes i...

As soon as possible   **Submission Notes**

Process 2179437 was submitted.
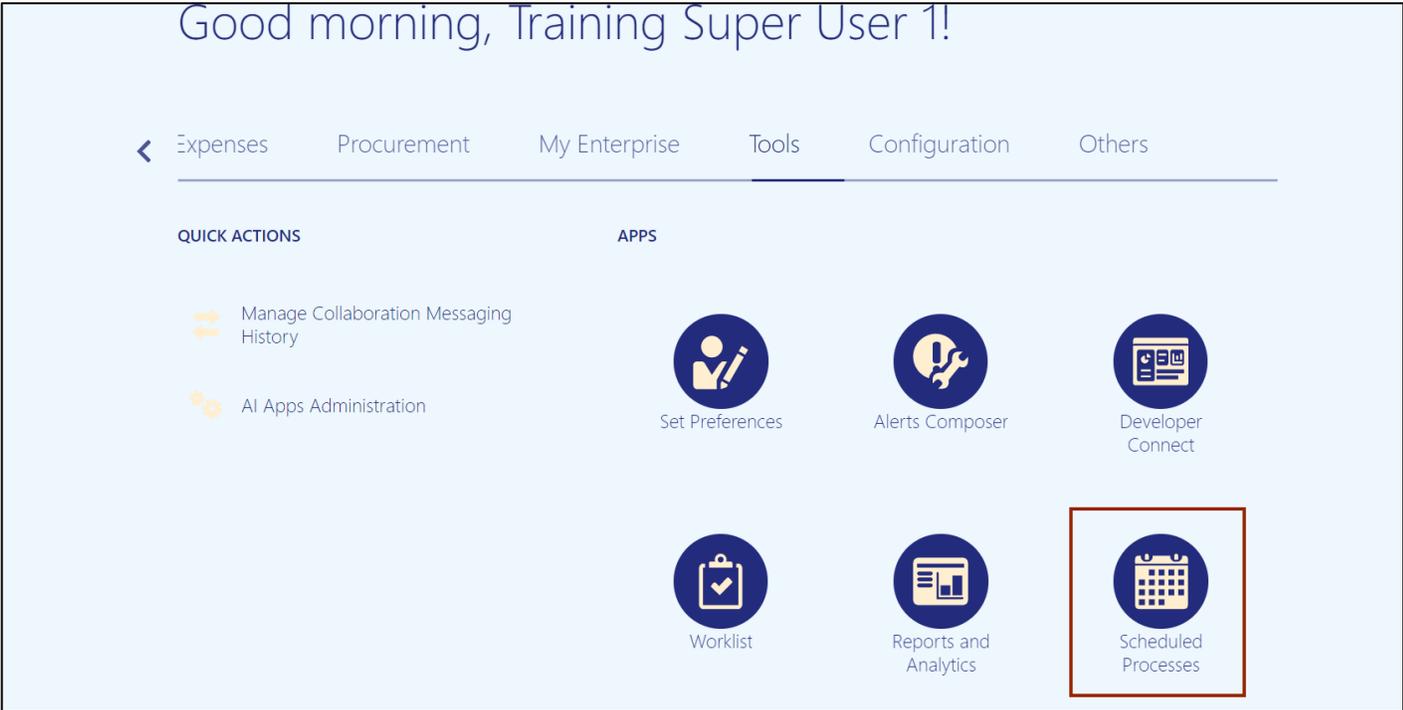
[OK]

...ptions

Run Refresh Control Budgets scheduled process

1. Navigate to **Home** page and then click the **Tools** tab.

2. Click the **Scheduled Processes** app.

3. Click the **Schedule New Process** button.

4. Click the **Arrow** [▾] icon.
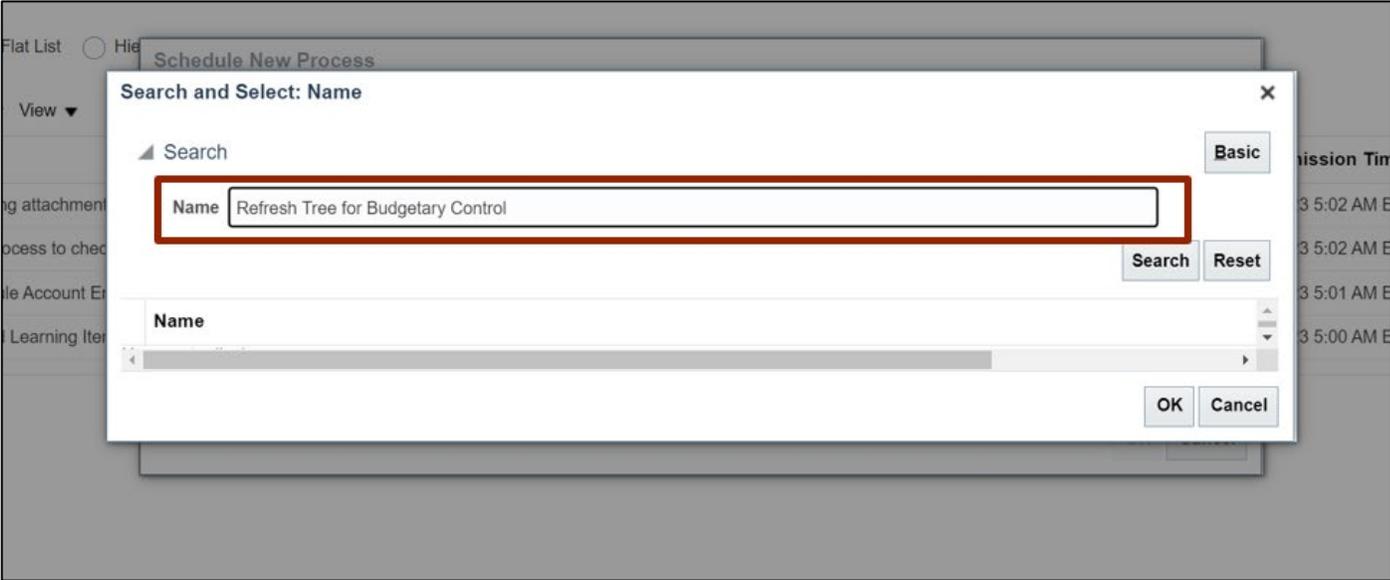
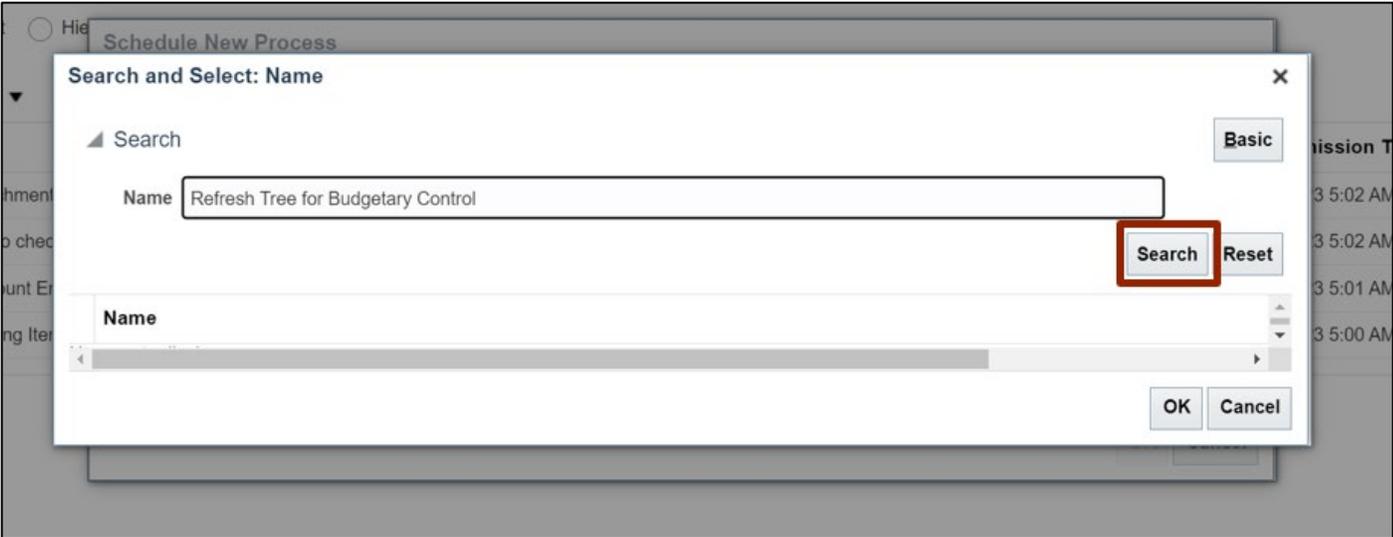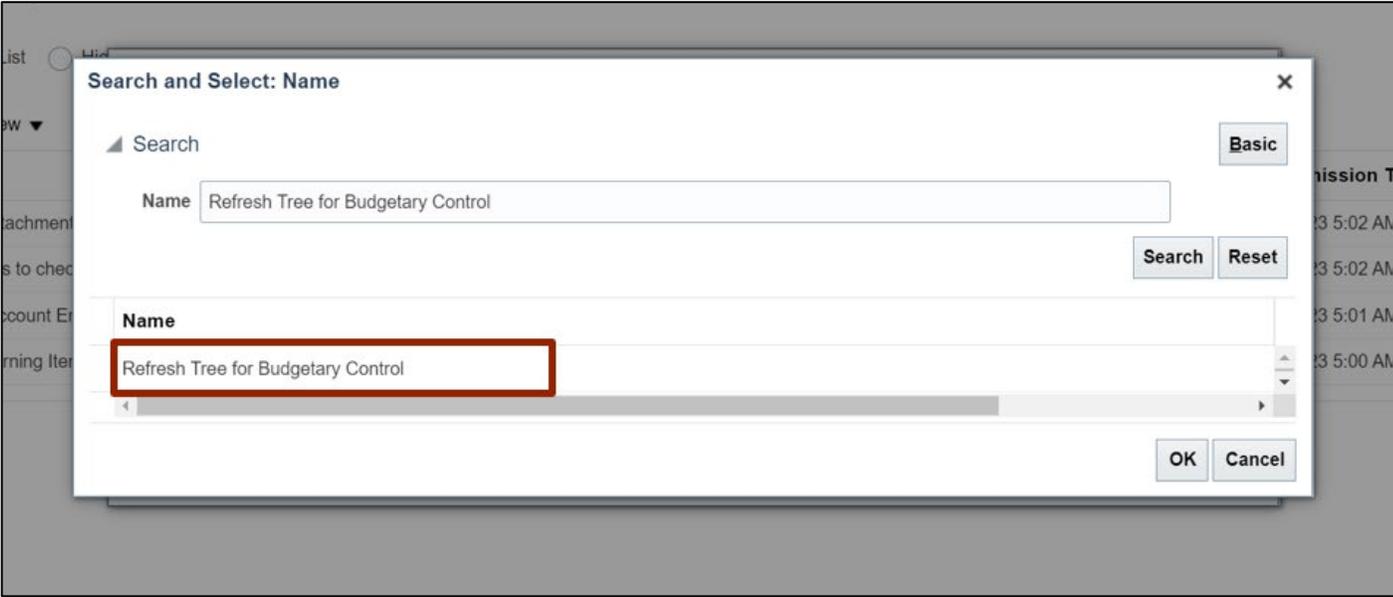5. Click the **Search** link.
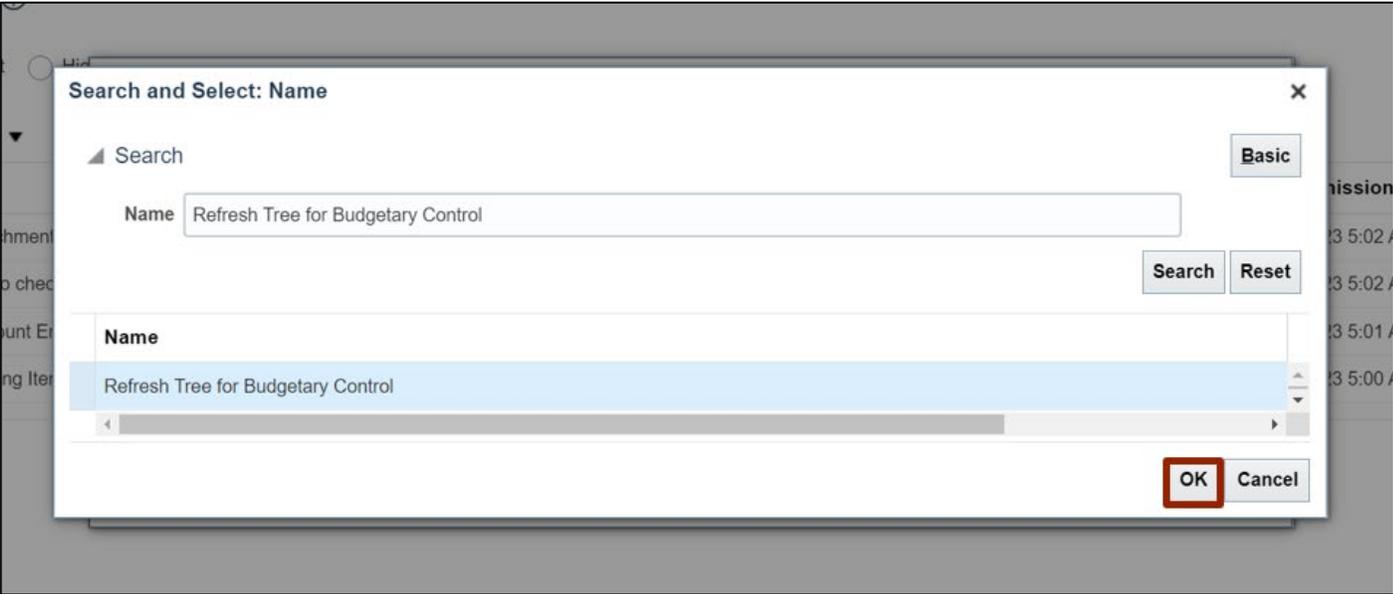

6. In the *Name* field, Enter **Refresh Tree for Budgetary Control.**

7. Click the **Search** button.

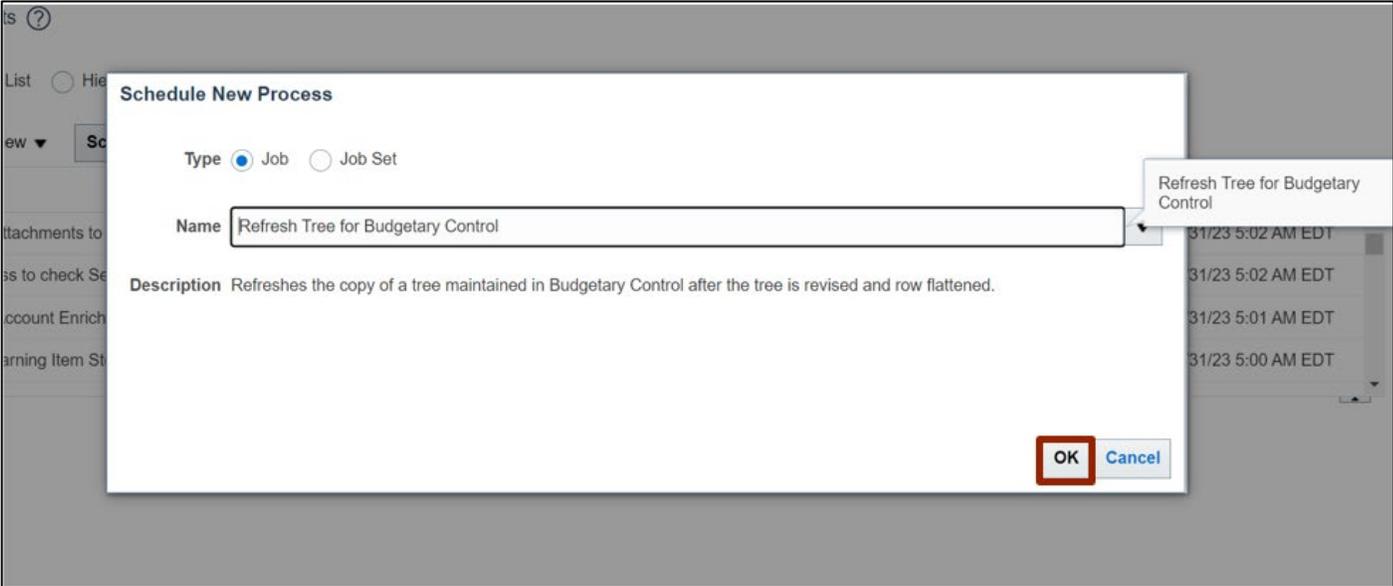8. Select the **Refresh Tree for Budgetary Control** from the result.

9.   Click the **OK** button.

10. The **Refresh Tree for Budgetary Control** is updated in the *Name* field, Click the **OK** button.

11. Enter the parameters.

12. Click the **Submit** button.

13. The **Confirmation** pop-up appears, Click the **OK** button.
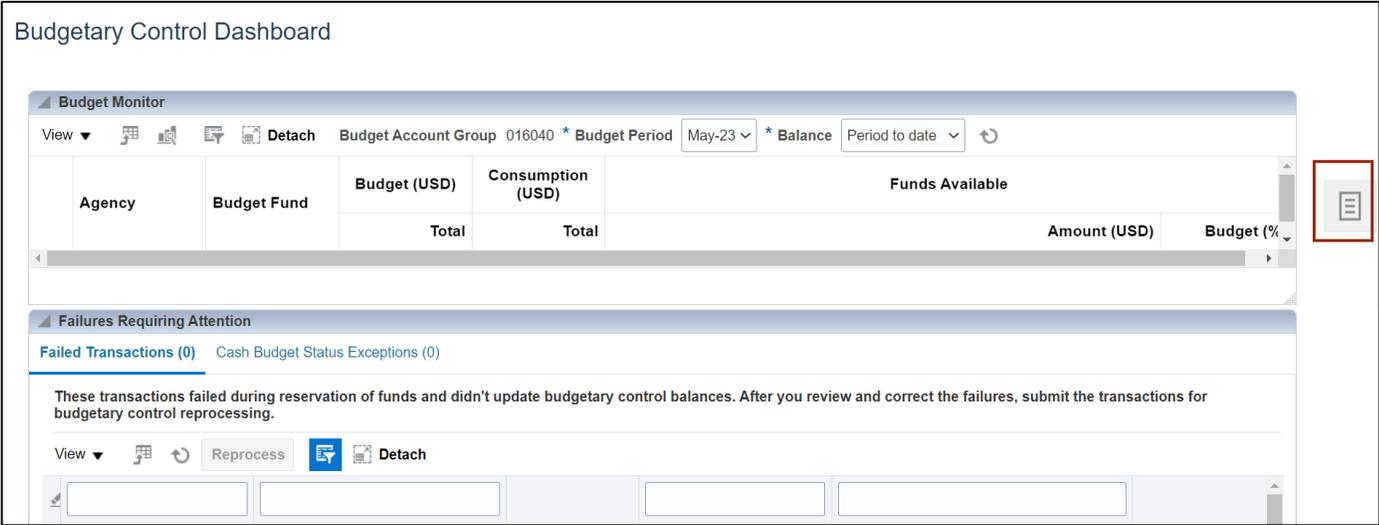

Prepare Control Budget for Use

1. Navigate to **Home** page and then click the **Budgetary Control** tab.
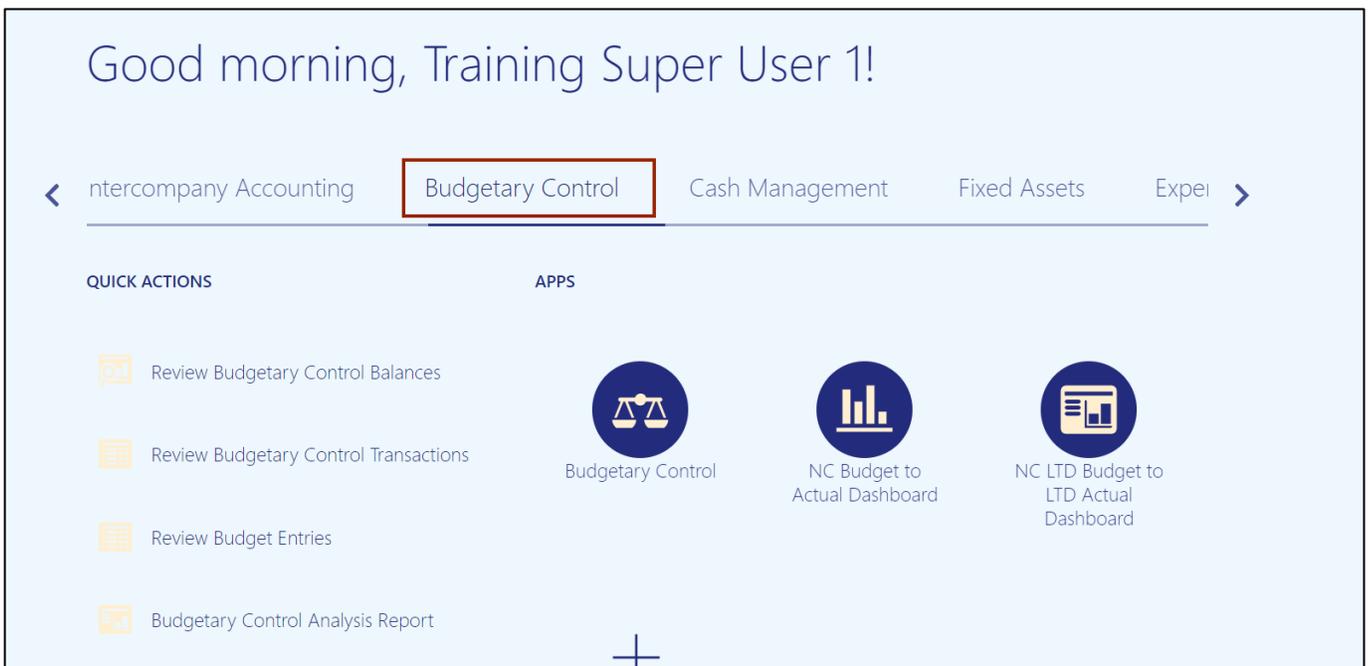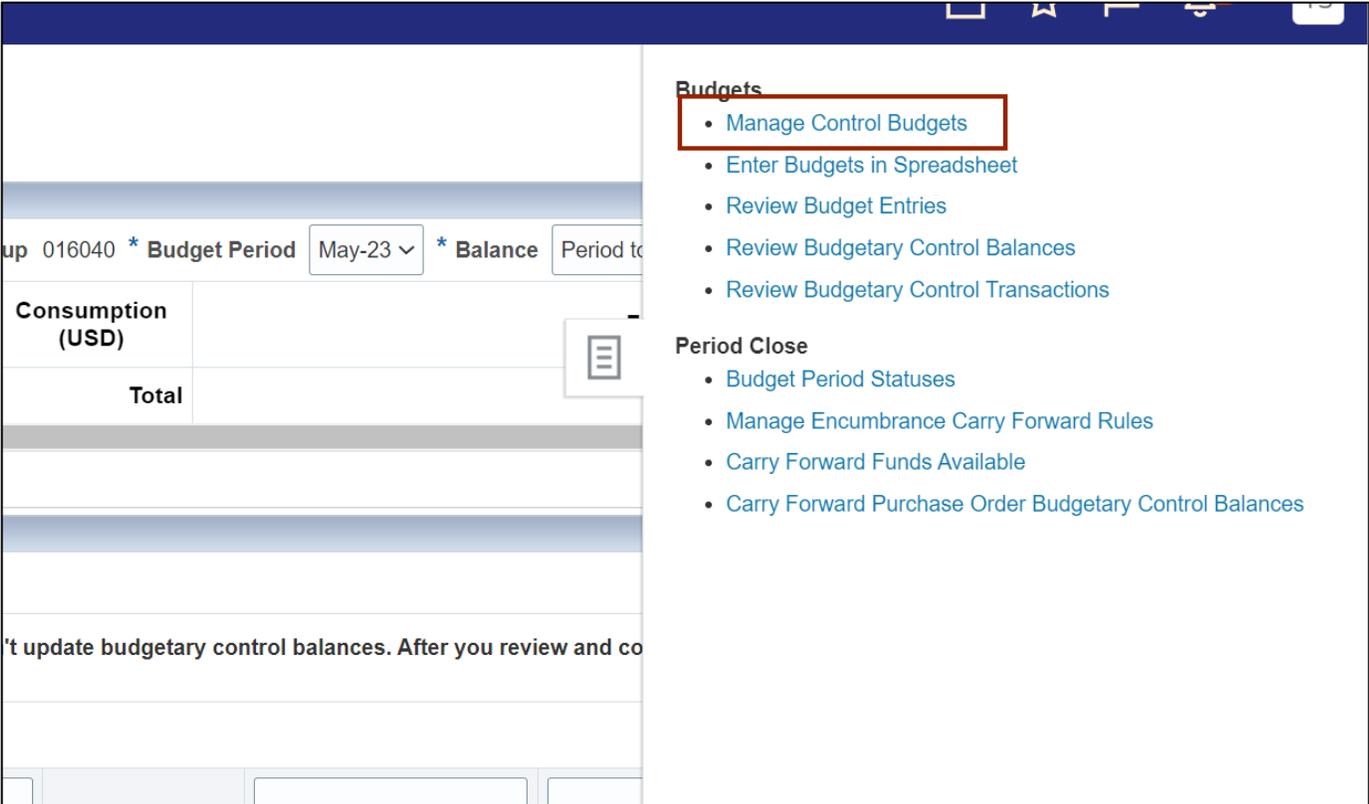
2. Click the **Budgetary Control** app.
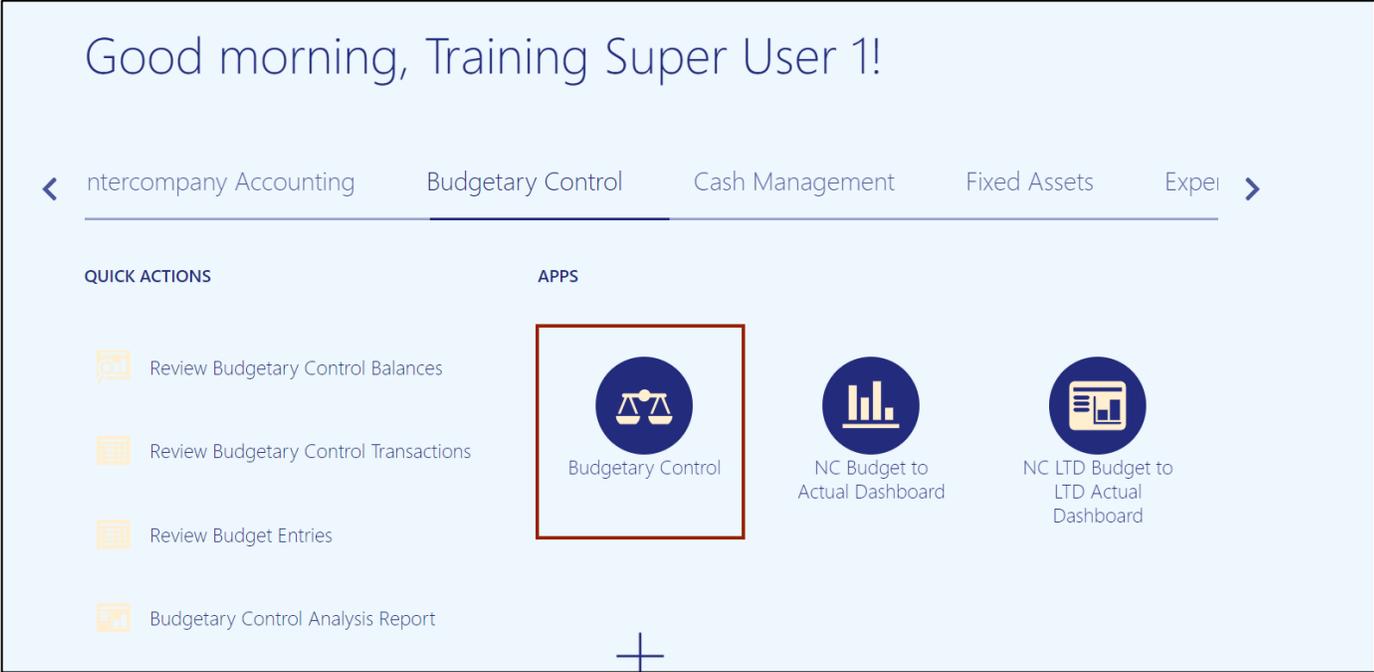
3. From the **Budgetary Control Dashboard** page, click the **Tasks** icon.

4. Under Budget, click **Manage Control Budgets.**

5. From the **Manage Control Budgets** page, select **NC Agency to Account Default Advisory CB** control budget with status **Closed.**

6. Click the **Action** arrow and select **Prepare for Use.**

7. The **Warning** pop-up appears, click the **Yes** button.

8. The status of the Control Budget is updated to **In-Use.**

Wrap-Up

Manage Control Budgets using the steps above in NCFS to close control budget for use, process accounting hierarchies for budgetary control, run refresh control budgets scheduled process, and prepare control budget for use.