Expenditure budgets

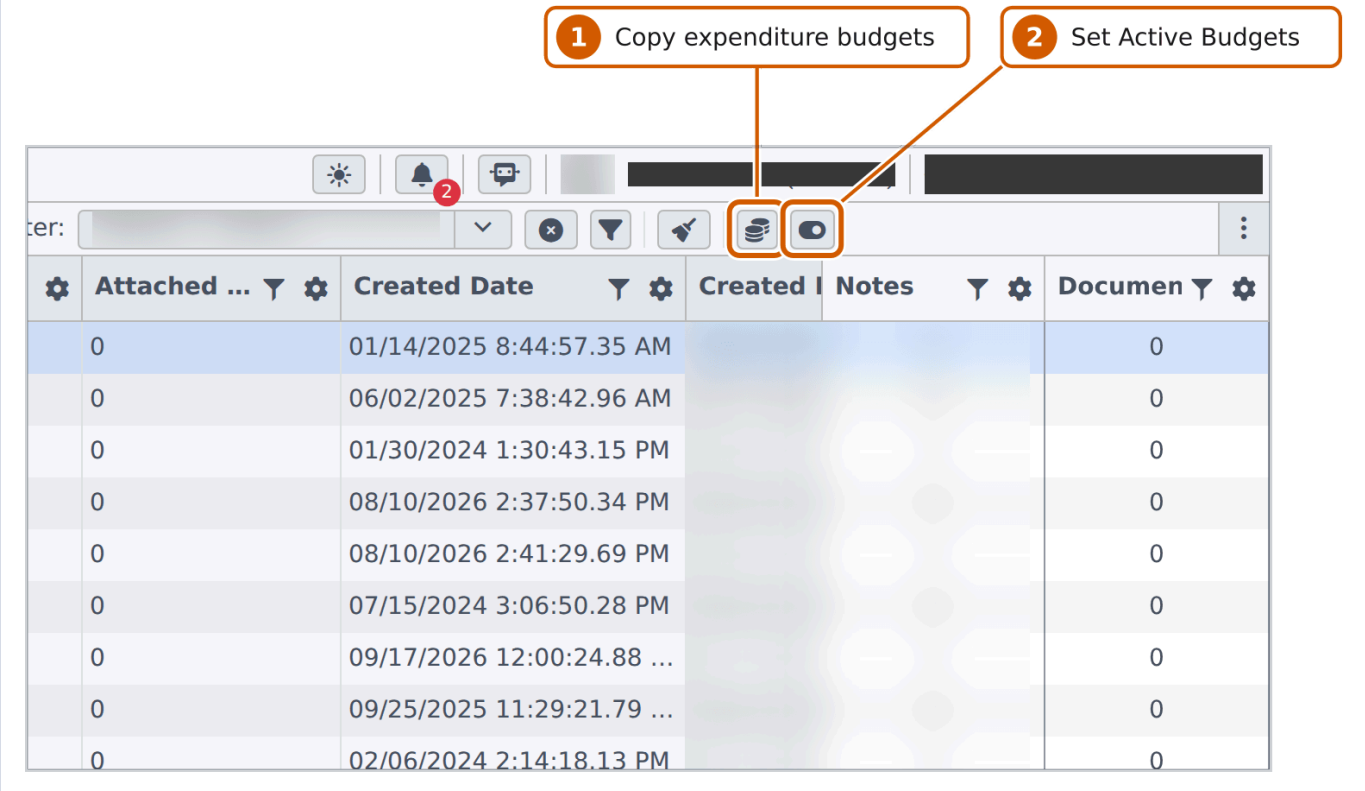
Overview

The **Expenditure Budgets** screen (Accounts Payable > Expenditure Budgets) is where you keep budgets. The main grid lists the budgets. Each budget has an expandable child grid of budget details for one or more fiscal years, with the fiscal-year balances. The child grid lists only Active budget details unless **Show Inactive Budget Details** is turned on.

From this screen you can:

- Show or hide inactive budget details with **Show Inactive Budget Details**.
- Carry budgets forward into a new fiscal year with the Copy Expenditure Budgets window.
- Set all budget details for a fiscal year to Active or Inactive at once with the Set Active Expenditure Budgets window.

To add and edit records in the grids, see Grid viewing and editing. For how parent and child grids and toolbars work, see Data grid overview and basics.



The Expenditure Budgets screen. The copy and Set Active Budgets buttons are on the toolbar.

1. Copy expenditure budgets
2. Set Active Budgets

Before you begin

- Sign in to IRIS10 (see Logging in).
- Make sure you have access to the Accounts Payable > Expenditure Budgets screen. For help finding it, see Navigating portals and pages.
- For Copy and Set Active, you need level 4 on the Expenditure Budgets screen. See Security Administration: access levels by user.
- Set up your fiscal years first. See Units of measure, fiscal years and organizations.

Procedure

Show or hide inactive budget details

1. Open Accounts Payable > Expenditure Budgets. The budgets grid opens. Expanding a budget shows its budget details. By default only Active details are listed.
2. Select the **Show Inactive Budget Details** checkbox on the toolbar. The grid reloads, and the budget-detail grids now include inactive details. No data is changed.

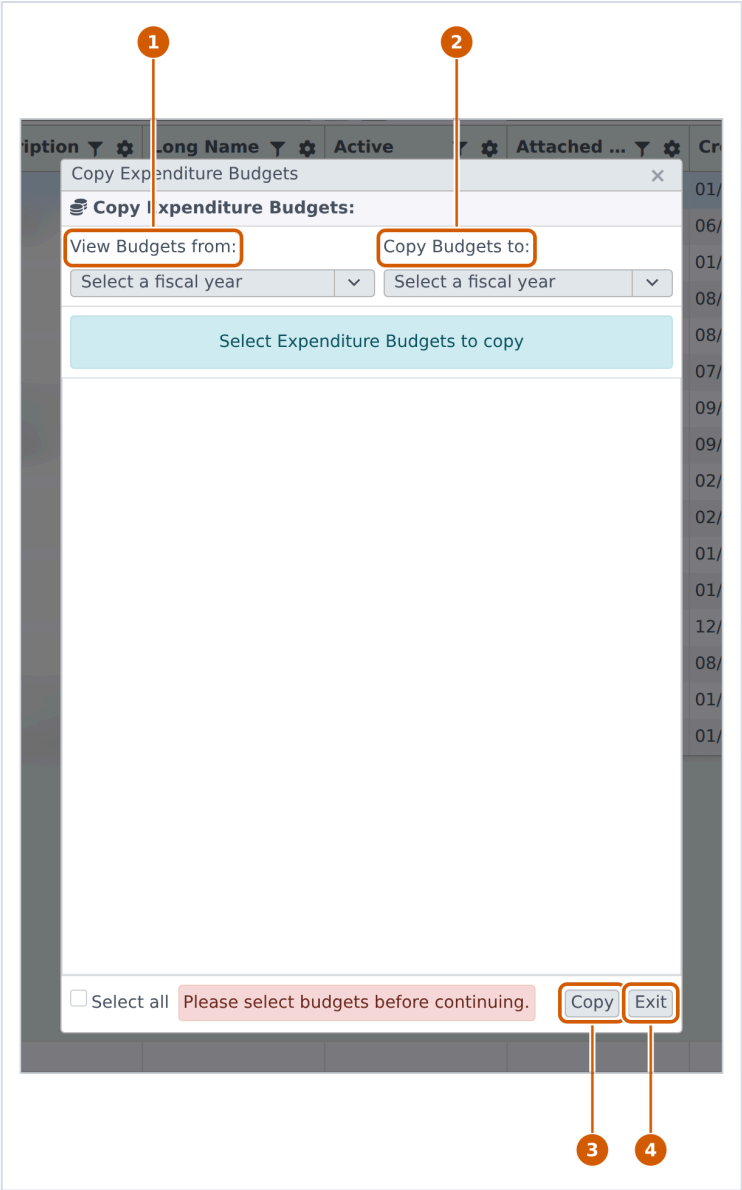
   > **Note:** You can also choose **Options** > **Show Inactive Budget Details**.

3. To hide inactive details again, clear the **Show Inactive Budget Details** checkbox. The grid reloads and shows only Active budget details. If the change cannot be saved, the checkbox goes back to its previous setting.

Copy expenditure budgets to another fiscal year

1. Open Accounts Payable > Expenditure Budgets. The budgets grid opens.
2. On the toolbar, click the button with the tooltip "Click to copy expenditure budgets." The Copy Expenditure Budgets window opens with the banner "Select Expenditure Budgets to copy". If no budgets have fiscal years, you see "There are no budgets with associated fiscal years to copy." and the window closes.

   > **Note:** This button needs access level 4 on the Expenditure Budgets screen. You can also choose **Options** > **Copy Expenditure Budgets**.



The Copy Expenditure Budgets window: choose the fiscal year to copy from and the year to copy to, then select the budgets.

1. View Budgets from:
2. Copy Budgets to:
3. Copy (acts at once)
4. Exit

3. In **View Budgets from:**, choose the fiscal year you want to copy from. The newest fiscal years appear at the top of the list. The budgets for the chosen year load into the list below, sorted by Name Desc.
4. In **Copy Budgets to:**, choose the fiscal year you want to copy into. This list shows the organization's fiscal years, not just years that already have budgets.
5. Select the budgets to copy in the list. You can select more than one. The budgets are highlighted.

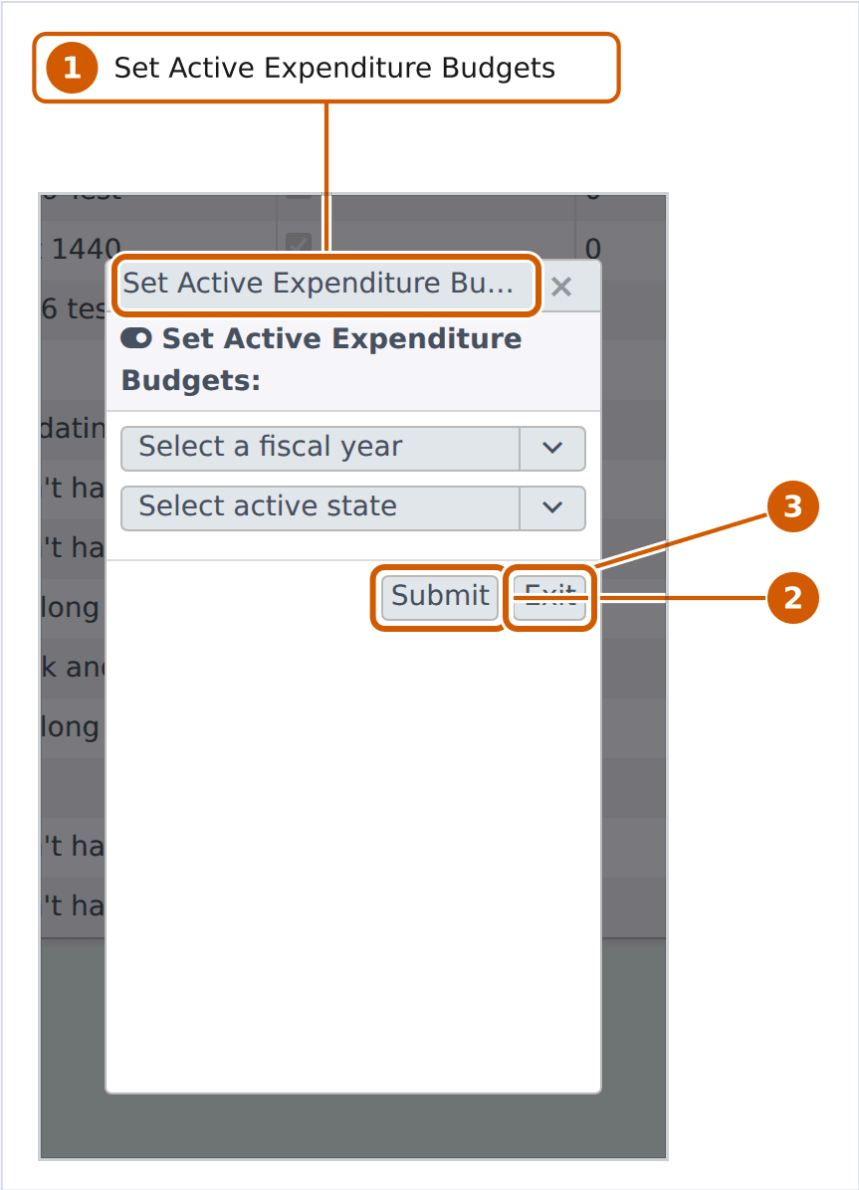
> **Note:** To copy every budget in the list, select **Select all**. If you change the selection by hand after using **Select all**, **Select all** is cleared.

6. Click **Copy**. The copy runs straight away, with no further confirmation. Both fiscal years and at least one budget are required. If no budgets are selected, the copy is not sent.
7. Read the result message. If it worked, you see "{N} expenditure budgets copied from: {from year} to: {to year}, successfully." If nothing could be copied, you see "No APS budget detail records where found with that criteria to copy forward or records already exist for the destination fiscal year".
8. Click **Exit** to close the window. The window closes. **Exit** makes no changes.

Set all budgets for a fiscal year to Active or Inactive

1. Open Accounts Payable > Expenditure Budgets. The budgets grid opens.
2. On the toolbar, click **Set Active Budgets** (tooltip "Click to set active state for expenditure budgets by fiscal year."). The Set Active Expenditure Budgets window opens. If no budgets have fiscal years, you see "There are no budgets with associated fiscal years." and the window closes.

> **Note:** This button needs access level 4 on the Expenditure Budgets screen. This action is not on the **Options** menu.



The Set Active Expenditure Budgets window. Submit changes every budget detail in the chosen fiscal year.

1. Set Active Expenditure Budgets
2. Submit (whole fiscal year)
3. Exit

3. In the fiscal-year list (placeholder "Select a fiscal year"), choose the fiscal year. The current status appears. It reads "Currently Active (N records)", "Currently Inactive (N records)", "X Active, Y Inactive of N records", or "No budget details found for this fiscal year".
4. In the state list (placeholder "Select active state"), choose **Active** or **Inactive**. The state you chose is shown.
5. Click **Submit**. The change applies straight away, with no further confirmation. Every budget detail in that fiscal year is set to the chosen state, whatever is selected or filtered in the grid. If a fiscal year or state is missing, you see "Please select both a fiscal year and an active state."

6. Read the result message. You see "Expenditure budgets for the selected fiscal year have been set to Active/Inactive successfully." The budgets grid reloads and the status text updates.
7. Click **Exit** to close the window. The window closes. **Exit** makes no changes.

Reference

Toolbar buttons and Options menu items

ACTION	WHERE	TOOLTIP	WHAT IT DOES	ACCESS
Copy expenditure budgets	Toolbar button, and **Options** > **Copy Expenditure Budgets**	Click to copy expenditure budgets.	Opens the Copy Expenditure Budgets window, which copies the selected budgets from one fiscal year into another	Level 4
Set Active Budgets	Toolbar button only	Click to set active state for expenditure budgets by fiscal year.	Opens the Set Active Expenditure Budgets window, which sets every budget detail in a fiscal year to Active or Inactive	Level 4
Show Inactive Budget Details	Toolbar checkbox, and **Options** > **Show Inactive Budget Details**	—	Shows or hides inactive budget details for the current session. Changes no data.	—

Budgets grid columns

COLUMN	NOTES
Organization	—
Name	Required. Up to 30 characters.
Description	Up to 50 characters
Name Desc	—
Long Name	Up to 50 characters
Active	Selected by default for new budgets
Attached Documents	—

Budget details (child grid) columns

COLUMN	NOTES
Fiscal	The fiscal year a budget detail belongs to
Budget Amount	—
Total Expenditure	—

COLUMN	NOTES
Remaining Balance	—
Warning Level	—
Active	Whether the budget detail is in use. Inactive details are hidden unless **Show Inactive Budget Details** is on.

What Copy creates

ITEM	RESULT IN THE DESTINATION FISCAL YEAR
Which budgets	Only the budgets you selected from the **View Budgets from:** year
Budget amount	Same as the source
Warning level	Same as the source
Balance	Set to the budget amount. The source balance is not carried over.
Active	Copied details are Active
Budget already in the destination year	Skipped. It is not overwritten or duplicated.

Messages

MESSAGE	WHEN IT APPEARS
There are no budgets with associated fiscal years to copy.	You open the copy window and no budgets have fiscal years. The window closes.
{N} expenditure budgets copied from: {from year} to: {to year}, successfully.	The copy worked
No APS budget detail records where found with that criteria to copy forward or records already exist for the destination fiscal year	Nothing was copied, for example because every selected budget already exists in the destination year
Unable to copy expenditure budgets due to a technical error. An email has been sent to support.	A technical error stopped the copy
There are no budgets with associated fiscal years.	You open Set Active and no budgets have fiscal years. The window closes.
Please select both a fiscal year and an active state.	You click **Submit** without choosing both values
Expenditure budgets for the selected fiscal year have been set to Active/Inactive successfully.	Set Active worked
Unable to set active state for expenditure budgets due to a technical error. An email has been sent to support.	A technical error stopped Set Active
You can not affect a tenant you are not logged into	You tried to change budgets for an organization you are not signed in to

Tips and notes

Important: Copy and Submit act as soon as you click them. There is no extra confirmation, so check both fiscal years and your selection first.

Important: Set Active changes every budget detail in the chosen fiscal year, including ones the grid is not showing. Selections and filters in the grid make no difference. See Grid filters.

Tip: Before you click **Submit** in Set Active, read the status text after choosing the fiscal year. If it says "No budget details found for this fiscal year", **Submit** will not change anything.

Note: You can run Copy again safely. Budgets that already exist in the destination year are skipped, never duplicated or overwritten.

Note: Show Inactive Budget Details lasts only for your current session. It is not saved as a permanent setting.

Note: Copy and Set Active only affect budgets in the organization you are signed in to.

Related topics

- Grid viewing and editing
- Data grid overview and basics
- Grid filters
- Units of measure, fiscal years and organizations
- Security Administration: access levels by user
- Revenue budgets
- Navigating portals and pages