

Budget Module

Module Guide: Budget Module

Module Location

Settings > Budget Settings > Budget Module

Module Purpose

The **Budget Module** serves as the "entry point" or main menu for accessing and beginning work on a previously defined budget set. After a budget version, matrix, and period have been configured, this module will display a list of the active budget sets that are ready to be filled out or reviewed. The user selects a budget set from this list to enter the data entry screen.?

1. Main View (List of Active Budgets)

The main page displays a list of all active budget period combinations that are ready for the data entry process.

View Explanation

- **Filter:** Allows searching by **Budget Period Code**.
- **Activity Budget Only:** This heading indicates that the list displayed is likely only for budgets that have been marked as active.
- **Active Budget Table:**

- **Budget Period Code:** The unique code of the budget period schedule.
 - **Period Name:** The descriptive name of that period schedule.
 - **Version:** Shows the Budget Version being used (e.g., Budget 2025 - Final).
 - **Type:** Likely refers to the Matrix dimension being used (COA, CCPC, or Project).
- Currently, the table shows "NO DATA," which means no budget periods have been selected or activated for data entry yet.

2. Integrated Workflow & Business Process

- **Gateway to Data Entry:** This module is the final step in the setup workflow. After all configurations are complete (Version, Matrix, Period), the list of budgets ready to be filled will appear here.?
- **Budget Entry Process:**
 - A user (e.g., a department manager) accesses this module.
 - They will see a list of budgets relevant to them (e.g., "Marketing Department Budget 2025").

- By clicking on a row in the table, the user is directed to the actual data entry screen. That screen will display a list of accounts or departments (according to the selected matrix) with columns for each month, where they can begin entering the budget figures.?

3. Tips & Important Notes

If you do not see the budget set you expect here, there is likely an issue in one of the three preceding setup modules:

- Ensure a **Budget Version** has been created.
- Ensure a **Budget Matrix** has been defined.
- Ensure a **Budget Period** has been created linking the correct Version and Matrix, and make sure its status is "Active."
- Access to this module is typically given to all users involved in the budget preparation process, such as department managers, project leaders, and the finance team.

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