

9. Budget Review & Budget Check

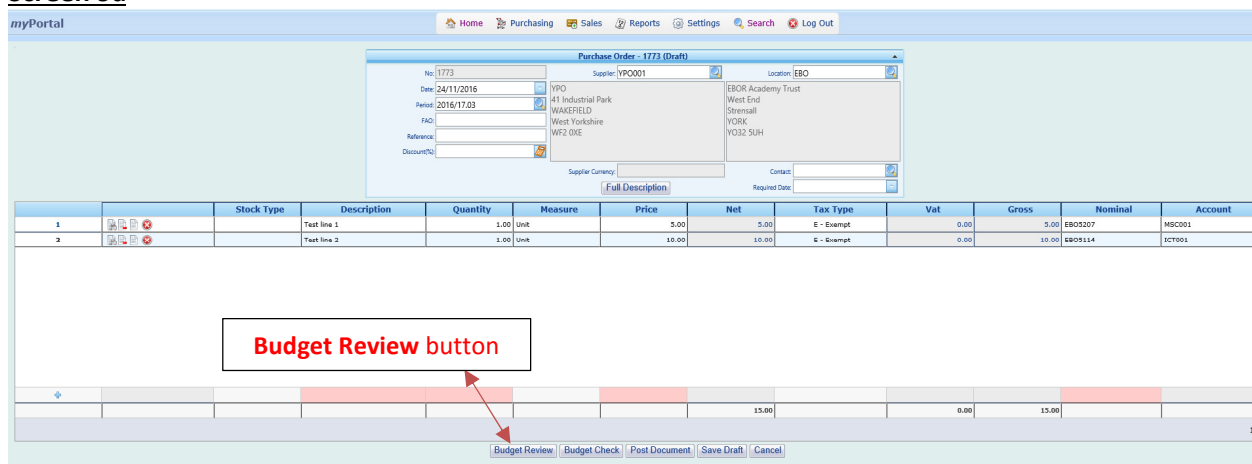
The **Budget Check / Budget Review** functionality within MyPortal provides a check of the ‘net value of goods / services’ on the purchase order against the relevant budget of the Nominal / Account combination entered.

Contents

- Screen 9a **Budget Review** Button
- Screen 9a (i) Review against **Full Year budget**
- Screen 9a (ii) Review against current **Period** budget
- Screen 9a (iii) Review against **Year to Date** budget
- Screen 9a (iv) **Overspend** indication

- Screen 9b **Budget Check** Button
- Screen 9b (i) Budget Check - ‘**No budget problems found**’
- Screen 9b (ii) Budget Check – **Budget Information** (**Overspend** indication)
- Screen 9b (iii) Radio buttons to select budget profile

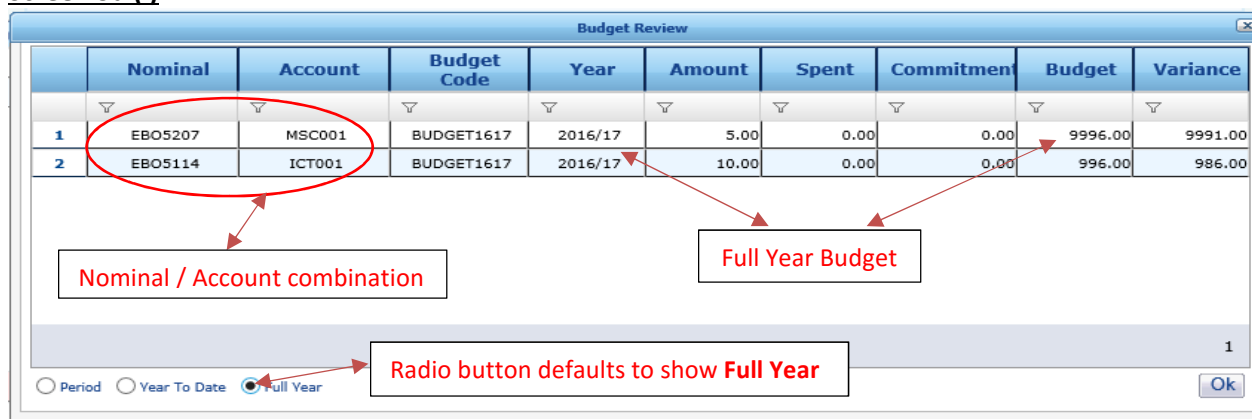
Screen 9a



The screenshot shows the 'Purchase Order - 1773 (Draft)' window. At the bottom of the window, there is a table with columns: Stock Type, Description, Quantity, Measure, Price, Net, Tax Type, Vat, Gross, Nominal, and Account. Two lines are visible: Line 1 (Test line 1) with a price of 5.00 and Line 2 (Test line 2) with a price of 10.00. A red box labeled 'Budget Review button' points to a button at the bottom of the window.

After an individual line of the purchase order has been entered, or when the purchase order has been completed with all lines of information, the **Budget Review** button becomes available, **prior** to the posting of the document.

Screen 9a (i)



The screenshot shows the 'Budget Review' window. It contains a table with the following data:

	Nominal	Account	Budget Code	Year	Amount	Spent	Commitment	Budget	Variance
1	EBO5207	MSC001	BUDGET1617	2016/17	5.00	0.00	0.00	9996.00	9991.00
2	EBO5114	ICT001	BUDGET1617	2016/17	10.00	0.00	0.00	996.00	986.00

Annotations in the screenshot include: a red circle around the 'Nominal' and 'Account' columns labeled 'Nominal / Account combination'; a red box around the 'Budget' column for line 1 labeled 'Full Year Budget'; and a red box around the 'Full Year' radio button at the bottom labeled 'Radio button defaults to show Full Year'.

The **Budget Review** screen will appear, as above. The **default** check is performed against the **full year budget**.

Screen 9a (ii)

Budget Review									
	Nominal	Account	Budget Code	Period	Amount	Spent	Commitment	Budget	Variance
1	EBO5207	MSC001	BUDGET1617	2016/17.03	5.00	0.00	0.00	833.00	828.00
2	EBO5114	ICT001	BUDGET1617	2016/17.03	10.00	0.00	0.00	83.00	73.00

Period
 Year To Date
 Full Year
 Ok

The purchase order value can be checked against the current **Period** budget, as above.

Screen 9a (iii)

Budget Review									
	Nominal	Account	Budget Code	Year	Amount	Spent	Commitment	Budget	Variance
1	EBO5207	MSC001	BUDGET1617	2016/17	5.00	0.00	0.00	2499.00	2494.00
2	EBO5114	ICT001	BUDGET1617	2016/17	10.00	0.00	0.00	249.00	239.00

Period
 Year To Date
 Full Year
 Ok

The purchase order value can be checked against the **Year to Date** budget, as above.

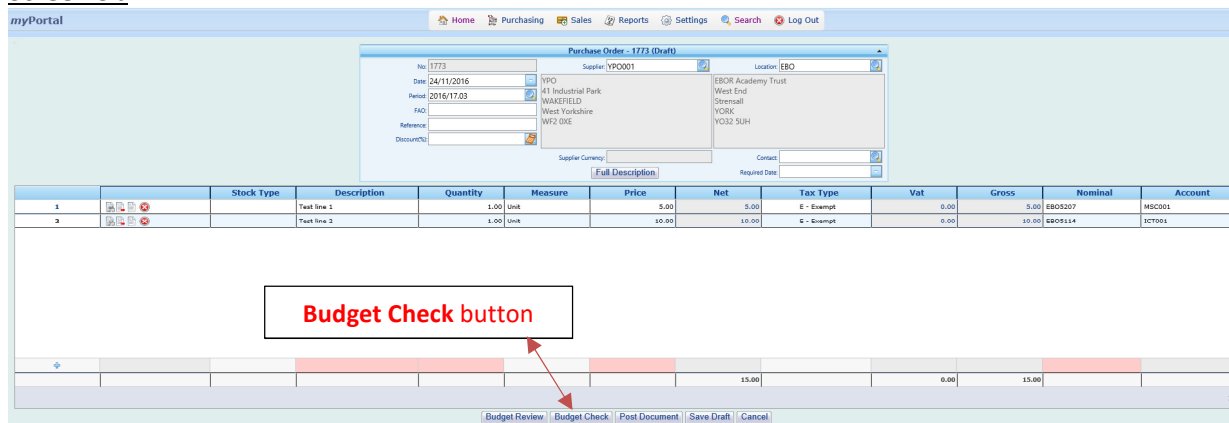
Screen 9a (iv)

Budget Review									
	Nominal	Account	Budget Code	Period	Amount	Spent	Commitment	Budget	Variance
1	EBO5207	MSC001	BUDGET1617	2016/17.03	1000.00	0.00	0.00	833.00	-167.00
2	EBO5114	ICT001	BUDGET1617	2016/17.03	10.00	0.00	0.00	83.00	73.00

Period
 Year To Date
 Full Year
 Ok

When the purchase order value would cause an **overspend**, the line is coloured **red**. The screenshot shown above displays an **overspend Variance** (a negative value).

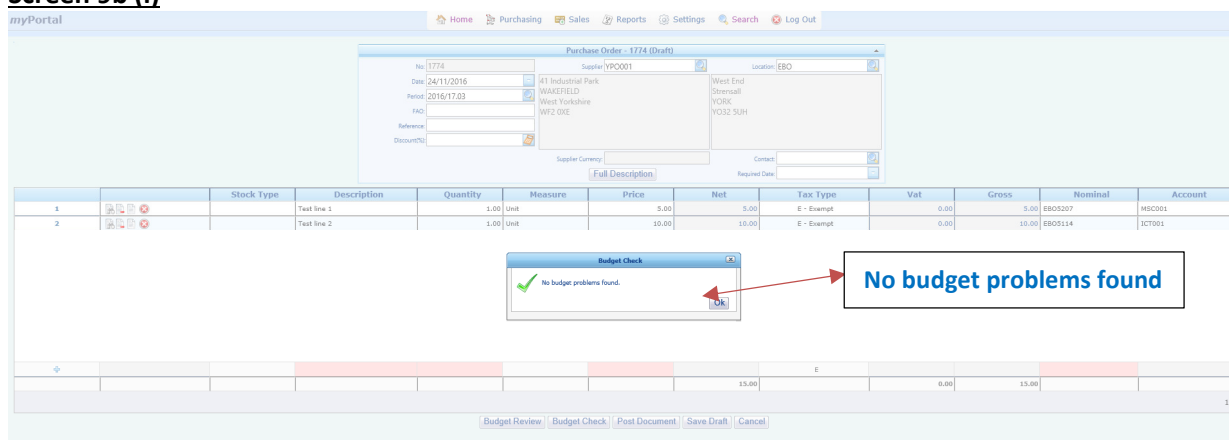
Screen 9b



Budget Check button

After an individual line of the purchase order has been entered, or when the purchase order has been completed with all lines of information, the **Budget Check** button becomes available **prior** to the posting of the document.

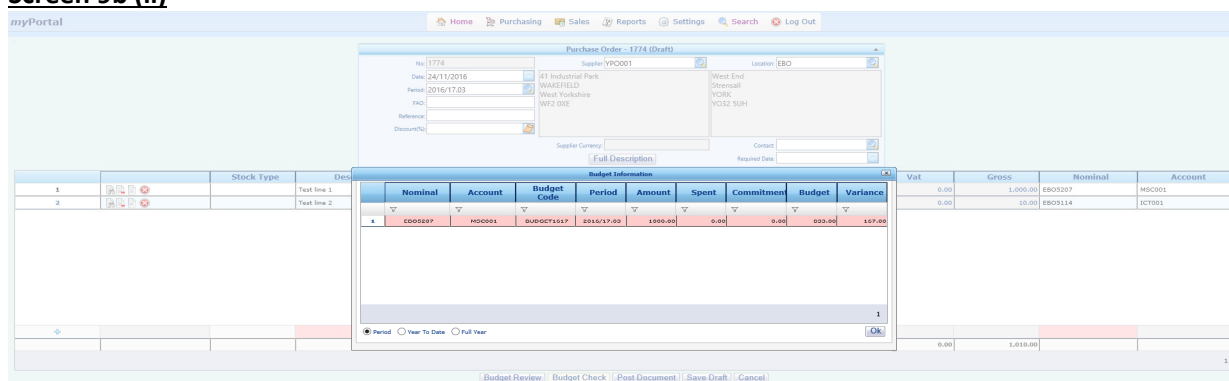
Screen 9b (i)



No budget problems found

If the current **Period budget** for the Nominal / Account combination is **greater than the value of the purchase order**, a message **'No budget problems found'** will appear. This indicates there **is** sufficient budget available to prevent an overspend if this purchase order were to be raised and/or authorised.

Screen 9b (ii)



Nominal	Account	Budget Code	Period	Amount	Spent	Commitment	Budget	Variance
EB05207	EB05114	BUDGET1617	2016/17.03	1000.00	0.00	0.00	923.00	157.00

If the current **Period budget** for the Nominal / Account combination is **less than the value of the purchase order**, the Budget Information window will appear. This indicates there **is not** sufficient budget available to prevent an overspend if this purchase order were to be raised and/or authorised.

Screen 9b (iii)

Budget Information

	Nominal	Account	Budget Code	Period	Amount	Spent	Commitment	Budget	Variance
1	EBO5114	ICT001	BUDGET1617	2016/17.03	250.00	0.00	0.00	83.00	-167.00

Radio buttons to select budget profile

Period Year To Date Full Year

1 Ok

Use the **radio buttons** to check the purchase order value against the budget **Year to Date** and/or **Full Year**.