Create a Simple Retro

Review Budget Details:
First check the funding source to confirm the Combination Code(s) to be used contain(s) the appropriate level of funding.

NOTE: You will require a security role that allows you to access the Commitment Control module.

1. Click the Main Menu.
2. Click the Commitment Control link.
3. Click the Review Budget Activities link.
4. Click the Budget Details link.
5. Enter the appropriate Ledger Group.
6. Click the Search button.
7. Enter the Department ID (e.g. 16920000) into the Department field. You can enter of field data if desired.
8. Click the Search button.
9. Click the View Details link of the desired budget record. Remember you can only complete Retros within the current Fiscal Year.
10. Confirm funding source contains the appropriate level of funding to cover the Retro.
Navigate to the Department Budget Table USA:

11. Click the **Main Menu** button.
12. Scroll the **Set Up HCM** menu with the mouse wheel.
13. Click the **Product Related** menu.
14. Click the **Commitment Accounting** menu.
15. Click the **Budget Information** menu.
16. Click the **Department Budget Table USA** menu.

Retrieve the DBT entry to be Retro’d:

17. On the **Find an Existing Value** tab, enter or Lookup the **Fiscal Year** to identify the budget year to which this distribution is attributed.
   - The fiscal year is July 1 through June 30.
18. Enter or Lookup the individual’s UFID.
   - You will only see employees associated with the department IDs for which you have security.
19. Click the **Search** button.
20. Select the appropriate **Employee Record**.

21. Click the **Add a Row** icon in the Level section.
22. Click the **Calendar** icon.

23. Choose the appropriate **month** and **day** to which the new date range will take effect. Be sure to start at the beginning of a pay period. In this example, enter December 18, 2015.

24. Enter the appropriate **Combination Code** on the new date range sequence.

25. Click the **Save** button.

26. If you wish to see the two date range sequences, click the **View All** link.

![Image of Calendar and Date Range Entry]

You can now see both the original 6/5/2015 DBT entry and the date the Retro was entered.

27. Since the dates used have passed, the Retro notification window will appear, click **OK**.

28. If this Retro affected grant-related funds, the Payroll Cost Transfer Information form will appear. Complete the form and save to finalize the Retro.