



# updatefiscalyearbyfund



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## **Human Resources > Utilities > PMIS > Update Fiscal Year by Fund**

page is used to select funds that need an updated fiscal year. When updating the fiscal year by fund, ensure the payroll frequency matches that of the logged-on payroll frequency. To update the fiscal year for another payroll frequency (e.g., E - Semimonthly NYR), you must change to that payroll frequency using the Change Payroll Frequency dialog box.

Position distribution records will be updated based on the logged-on pay frequency. For example:

If you are logged on to a current year pay frequency, current year position management distribution records are incremented for selected funds.

If logged on to a next year pay frequency, forecast position management records are incremented for selected funds.

**Note:** Create an export using Export PMIS Tables prior to using this utility.

### **Update the fiscal year:**

Under **Increment Fiscal Year by 1:**

Select **Increment** to increment the fiscal year by one. If **Increment** is not selected, the fiscal year is not incremented.

The **Fund/Year** field is display only and indicates the fund/fiscal year that can be incremented.

**Note:** The new fund/fiscal year must exist in the current year or Budget of next year.

Click **Retrieve** to reset all rows with Increment selected to the default setting (e.g., clear the check boxes). If you click **Retrieve**, any unprocessed changes are lost.

Click **Execute** to start the update process.


[Create a backup.](#)

A backup is highly recommended. Click **Yes** to create an export. Otherwise, click **No** to not create the export and continue with the process.

Type a password for the archive, and then click **Continue**. An export spinning wheel is displayed indicating the progress of the export process.

When the export process is completed, the File Download page is displayed.

Select **Save File**, and then click **OK**. The Save As dialog box is displayed. Otherwise, click **Cancel** to close the dialog box.

In the **Save As** field, click  to navigate to the appropriate folder.

In the **File name** field, the file name is set to dbccddd\_pmis\_mmddyyyy.rsf, where cccddd is the county-district number and mmddyyyy is the current date.

Click **Save**. Otherwise, click **Cancel** to close the Save As dialog box without saving the file.

After the export process is completed, the actual update is performed. If the update is successful, a message indicating that the update process was completed successfully is displayed.



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