

Recommended - BUD3100

Table of Contents

Recommended - BUD3100 i
Recommended - BUD3100 1

Recommended - BUD3100

Budget > Maintenance > Budget Data - Quick Entry > Recommended

This tab is used to enter a recommended amount in the **Next Yr Recommend** column for an account code. You can quickly enter amounts and notes, and either tab to another row or use the scroll bar to locate accounts. Changes to account codes cannot be made on this tab. If account codes need to be changed, use the Budget Data Maintenance page.

If the **Next Yr Recommend** field is locked, changes cannot be made to the amounts or the notes. Accounts can be locked by setting a date on the Tables > Budget Options page. After the set date, the **Next Yr Amount** field is no longer accessible. You can use the Mass Lock/Unlock utility to lock individual accounts and associated amounts and notes.

All available account codes are displayed.

- All **Next Yr Requested** account codes are display only.
- If an account is locked, the **Next Yr Recommend** field cannot be changed. Use the Mass Lock/Unlock utility to lock or unlock the selected account.

Narrow the account code list:

Field	Description
Org	Select an organization code and description for which you want to retrieve account codes.

Click **Retrieve**. All account codes with the selected organization code are displayed.

Review and enter data:

Field	Description
Lock	The lock status of the account code is displayed. *Y* - The account code is locked. *N* - The account code is unlocked. Use the Mass Lock/Unlock utility to lock or unlock the selected account.
Note	The note status of the account code is displayed. *Y* - Comments exist. *N* - No comments exist.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Details</td><td>Click to view any previously entered notes and other details for the associated account code. The Budget Data Details pop-up window is displayed.
The account code number and description are displayed at the top of the window.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Last Yr Closing Amt</td><td>The amount of the account balance at the end of the previous fiscal year is displayed. When the budget is initialized, you can update this amount with either the This Yr Amend Budget or This Yr Actual Amt, which would reflect the ending totals for the previous year.</td></tr>
<tr><td>This Yr Original Budget</td><td>The budget amount that was approved for the selected account during the current fiscal year is displayed.</td></tr>
<tr><td>This Yr Amend Budget</td><td>The amended budget amount for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.</td></tr>
<tr><td>This Yr Actual Amt</td><td>The amount expended for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.</td></tr>
<tr><td>School Year</td><td>The current school year in the YYYY-YYYY format as entered on the District Budget Options table is displayed.</td></tr>
<tr><td>Next Yr Requested</td><td>The previously requested budget amount for the selected account code is displayed. The amount cannot be changed on this tab.</td></tr>
<tr><td>Next Yr Recommended</td><td>Type the amount of the recommended budget for the selected account code. If the selected account is locked, the field is display only and cannot be changed.</td></tr>
<tr><td>Lock Flag</td><td>If the Lock Flag is set to Y, the account amount and notes are locked to prevent any changes to the Next Yr Recommended field. No changes can be made until the account code is unlocked.
If the Lock Flag field is set to N, the account amount and notes are unlocked, and the Next Yr Recommended field can be changed and notes added or modified.
Use the Mass Lock/Unlock utility to lock or unlock the selected account.</td></tr>
<tr><td>Description</td><td>Type the description of the account code, if different from the displayed name. The field can be a maximum of 30 characters. Changes made here will also change the descriptions on the Requested and Approved tabs.</td></tr>
<tr><td>Notes</td><td>Type comments, additional justification, or instructions about this account code.

Notes:

If an account code is locked, the account code note is display only. No changes can be made to the account code note until the account code is unlocked.

A limited portion of the note for each account is displayed on the BUD1000 - Budget Report by Fund and BUD1100 - Budget Report by Organization. If the content of the note exceeds the allotted space on the report, the remaining portion of the note will not display. For example, all uppercase W characters are approximately 70 character spaces, so only that many would display. If you use a majority of lowercase characters, more characters can be displayed</td></tr>
</table>
Use the following buttons to view other details of other account codes:
• Click to view the next account code.
• Click to view the previous account code.
• Click OK to save the changes and close the window.</td></tr>
</table>

Field	Description
Account Code	The account code components are displayed.
Next Yr Requested	The previously requested amounts for the account code is displayed. The amount cannot be changed on this tab.
Next Yr Recommended	The previously recommended amount for the account code is displayed, the amount can be changed if the selected account is not locked.
Description	The account description from the chart of accounts is displayed.
Total	The totals of all amounts in the **Next Year Requested** and **Next Yr Recommend** columns of each account code is displayed. The calculation of these values is based on the formula, Total = Grand Total Estimated Revenues + Grand Total Other Resources - Grand Total Fund Balance - Grand Total Appropriation - Grand Total Other Uses.

Click Refresh Totals.
Click to update the totals.

To create a new row using the data from an existing row, select the desired row, and click **Duplicate Record**. You must change the account code of the newly duplicated row prior to saving the record.

Click **Save**.

Other functions and features:

Retrieve	Retrieve data. The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
Print	Print account data. **Review the report using the following buttons**: Click First to go to the first page of the report. Click to go back one page. Click to go forward one page. Click Last to go to the last page of the report. **The report can be viewed and saved in various file formats**. Click to save and print the report in PDF format. Click to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included. Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.