



Budget: Maintenance

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Maintenance

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Budget Data

Use the Table of Contents to access a page.

Approved- BUD3000

Budget > Maintenance > Budget Data > Approved

This tab used to create, delete, and duplicate account codes, and enter amounts and notes associated with those account codes. An account code that is added, deleted, modified, or duplicated on this tab also changes the account code on the Requested and Recommended tabs. Changes in account codes on the Requested and Recommended tabs also affect the Approved tab.

If an account code or fund and fiscal year have been locked, changes cannot be made to that account amount or the notes on any of the tabs. Accounts can be locked by setting a date on the Tables > Budget Options page. Accounts, amounts, and notes can no longer be accessed after the cutoff date. You can use the Utilities > Mass Lock/Unlock page to lock individual accounts, associated amounts, and notes.

All available account codes are displayed.


Narrow the account code list:

Field	Description
Account Code	The 20-character account code mask with all Xs is displayed. Type only the account code elements (e.g., fund, function, object, etc.) to be included in the search. Each account code component is independent of the other components.

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


Review and add account code data:

☐ Click **+Add** to add a row to the last page of account codes.

- Click  to go to the last page if there is more than one page of account codes.
- Populate the account code component fields, and the **Next Yr Recommended** and **Description** fields.


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.


Details

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.

Field	Description
Last Yr Closing Amt	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.
This Yr Original Budget	The budget amount that was approved for the selected account during the current fiscal year is displayed.
This Yr Amend Budget	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.
This Yr Actual Amt	The amount expended for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.
School Year	The current school year in the YYYY-YYYY format as entered on the District Budget Options table is displayed.
Next Yr Requested	The previously requested budget amount for the selected account code is displayed. The amount cannot be changed on this tab.
Next Yr Recommended	The previously recommended budget amount for the selected account code during the next fiscal year is displayed. The amount cannot be changed on this tab.
Next Yr Approved	Type the amount of the approved budget for the selected account code. If the selected account is locked, this field is display only and cannot be changed.
Lock Flag	If the Lock Flag is set to Y, the account amount and notes are locked to prevent any changes to the Next Yr Approved 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 Approved field can be changed and notes added or modified. Use the Mass Lock/Unlock utility to lock or unlock the selected account.
Description	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.
Notes	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

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.

Account Code	<p>Type only the account code elements (e.g., fund, function, or object). Each account code component is independent of the other components.</p> <p>To view a list of account code components, place the cursor in one of the account code component fields, and click Lookup or press F2. A pop-up window is displayed for the applicable account code component.</p> <p>In the Search field, type the account code component. A list of available account code components is displayed.</p> <p>Select an account code component from the list. Otherwise, click Cancel to return to the Requested tab.</p>
Next Yr Requested	The previously requested amount 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 cannot be changed on this tab.
Next Yr Approved	The previously approved amount for the account code is displayed. The amount can be changed in either the grid or in the free-form area at the bottom of the tab.
Description	The account description from the chart of accounts is displayed. The information can be changed. The field can be a maximum of 30 characters.
Total	The totals of all amounts in the Next Year Requested and Next Yr Recommend columns of each account code 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.
Duplicate Record	Select a row to duplicate and click to create a new row using the data from the existing row. You must change the account code of the newly duplicated row prior to saving the record.
Refresh Description	Click after an existing object code number is entered to update the Description field. The object code description is populated from the Object tab.
Refresh Totals	Click to update the totals.

☐ Click **Save**.

Other functions and features:

Retrieve	The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost.
Print	Click to print the report. Review the report.
	<p>Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.</p> <p>Click Save.</p> <p>If all columns are not zero, or if the account is being used by Finance, Human Resources, or Requisition, a warning message is displayed and the account code cannot be deleted.</p>

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~~HIDEPAGE~~

Recommended - BUD3000

Budget > Maintenance > Budget Data > Recommended

This tab is used to create, delete, and duplicate account codes, and enter amounts and notes associated with those account codes. An account code that is added, deleted, modified or duplicated on this tab also changes the account code on the Requested and Approved tabs. Changes in the account codes on the Requested and Approved tabs affect the Recommended tab.

If an account code or fund and fiscal year are locked, changes cannot be made to that account amount or the notes on any of the tabs. Accounts can be locked by setting a date on the Tables > Budget Options page. Accounts, amounts, and notes can no longer be accessed after the cutoff date. You can use the Utilities > Mass Lock/Unlock page to lock individual accounts, associated amounts, and notes.

All available account codes are displayed.


Narrow the account code list:

Field	Description
Account Code	The 20-character account code mask with all Xs is displayed. Type only the account code elements (e.g., fund, function, object, etc.) to be included in the search. Each account code component is independent of the other components.

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


Review and add account code data:

☐ Click **+Add** to add a row to the last page of account codes.

- Click  to go to the last page if there is more than one page of account codes.
- Populate the account code component fields, and the **Next Yr Recommended** and **Description** fields.

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.



Details

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.

Field	Description
Last Yr Closing Amt	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.
This Yr Original Budget	The budget amount that was approved for the selected account during the current fiscal year is displayed.
This Yr Amend Budget	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.
This Yr Actual Amt	The amount expended for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.
School Year	The current school year in the YYYY-YYYY format as entered on the District Budget Options table is displayed.
Next Yr Requested	The previously requested budget amount for the selected account code is displayed. The amount cannot be changed on this tab.
Next Yr Recommended	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.
Lock Flag	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.
Description	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.
Notes	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


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.

Account Code	<p>Type only the account code elements (e.g., fund, function, or object). Each account code component is independent of the other components.</p> <p>To view a list of account code components, place the cursor in one of the account code component fields, and click Lookup or press F2. A pop-up window is displayed for the applicable account code component.</p> <p>In the Search field, type the account code component. A list of available account code components is displayed.</p> <p>Select an account code component from the list. Otherwise, click Cancel to return to the Requested tab.</p>
Next Yr Requested	The previously requested amounts for the account code is displayed. The amount cannot be changed on this tab.
Next Yr Recommended	Type the amount that is being recommended for the account code.
Description	The account description from the chart of accounts is displayed. The information can be changed. The field can be a maximum of 30 characters.
Total	The totals of the 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.
Refresh Description	Click after an existing object code number is entered to update the Description field. The object code description is populated from the Object tab.
Refresh Totals	Click to update the totals.
Duplicate Record	Select a row to duplicate and click to create a new row using the data from the existing row. You must change the account code of the newly duplicated row prior to saving the record.

☐ Click **Save**.

Other functions and features:

Retrieve	The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost.
Print	Click to print the report. Review the report.
	<p>Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.</p> <p>Click Save.</p> <p>If all columns are not zero, or if the account is being used by Finance, Human Resources, or Requisition, a warning message is displayed and the account code cannot be deleted.</p>

Requested - BUD3000

Budget > Maintenance > Budget Data > Requested

This tab is used to create, delete, and duplicate account codes, and enter amounts and notes associated with those account codes. An account code that is added, deleted, modified, or duplicated on this tab will change the account code on the Recommended and Approved tabs. Changes to the account codes on the Recommended and Approved tabs also affect the Requested tab.

If an account code or fund and fiscal year are locked, changes cannot be made to that account amount or the notes on any of the tabs. Accounts can be locked by setting a date on the Tables > Budget Options page. Accounts, amounts, and notes can no longer be accessed after the cutoff date. You can use the Utilities > Mass Lock/Unlock page to lock individual accounts, associated amounts, and notes.

All available account codes are displayed.

Narrow the account code list:

Field	Description
Account Code	The 20-character account code mask with all Xs is displayed. Type only the account code elements (e.g., fund, function, object, etc.) to be included in the search. Each account code component is independent of the other components.


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

Review and add account code data:

Click **+Add** to add a row to the last page of account codes. Click ⏮ to go to the last page if there is more than one page of account codes. Populate the account code component fields, and the **Next Yr Requested** and **Description** fields.

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.


Details

Click  to view any previously entered notes and other details for the associated account code. The Budget Data Details pop-up window opens.
The account code number and description are displayed at the top of the window.

Field	Description
Last Yr Closing Amt	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.
This Yr Original Budget	The budget amount that was approved for the selected account during the current fiscal year is displayed.
This Yr Amend Budget	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.
This Yr Actual Amt	The amount expended for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.
School Year	The current school year in the YYYY-YYYY format as entered on the District Budget Options table is displayed.
Next Yr Requested	Type the amount of the requested budget for the selected account code. If the selected account is locked, the field is display only and cannot be changed.
Lock Flag	If the Lock Flag is set to Y, the account amount and notes are locked to prevent any changes to the Next Yr Requested 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 Requested field can be changed and notes added or modified. Use the Mass Lock/Unlock utility to lock or unlock the selected account.
Description	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.
Notes	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

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.

Account Code	<p>Type only the account code elements (e.g., fund, function, or object). Each account code component is independent of the other components.</p> <p>To view a list of account code components, place the cursor in one of the account code component fields, and click Lookup or press F2. A pop-up window is displayed for the applicable account code component.</p> <p>In the Search field, type the account code component. A list of available account code components is displayed.</p> <p>Select an account code component from the list. Otherwise, click Cancel to return to the Requested tab.</p>
Next Yr Requested	Type the amount of the requested budget for the selected account code. If the selected account is locked, the field is display only and cannot be changed.
Description	The account description from the chart of accounts is displayed. The information can be changed. The field can be a maximum of 30 characters.
Total	<p>The total of the amounts in the Next Yr Requested column of each account code is displayed.</p> <p>The calculation of this value 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.</p> <p>Note: No 61XX accounts are displayed on this tab, even if the user profile allows access. This will affect the value displayed in the Total field.</p>
Refresh Description	Click after an existing object code number is entered to update the Description field. The object code description is populated from the Object tab.
Refresh Totals	Click to update the totals.

☐ Click **Save**.

Other functions and features:

Retrieve	The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost.
Print	Click to print the report. Review the report.
	<p>Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.</p> <p>Click Save.</p> <p>If all columns are not zero, or if the account is being used by Finance, Human Resources, or Requisition, a warning message is displayed and the account code cannot be deleted.</p>

Budget Data - Quick Entry

Use the Table of Contents to access a page.

Approved- BUD3100

Budget > Maintenance > Budget Data - Quick Entry > Approved

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

If the **Next Yr Approved** 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 Approved** 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 account code elements are displayed.

Review and enter data:


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.


Details

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.

Field	Description
Last Yr Closing Amt	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.
This Yr Original Budget	The budget amount that was approved for the selected account during the current fiscal year is displayed.
This Yr Amend Budget	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.
This Yr Actual Amt	The amount expended for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.
School Year	The current school year in the YYYY-YYYY format as entered on the District Budget Options table is displayed.
Next Yr Requested	The previously requested budget amount for the selected account code is displayed. The amount cannot be changed on this tab.
Next Yr Recommended	The previously recommended budget amount for the selected account code during the next fiscal year is displayed. The amount cannot be changed on this tab.
Next Yr Approved	Type the amount of the approved budget for the selected account code. If the selected account is locked, this field is display only and cannot be changed.
Lock Flag	If the Lock Flag is set to Y, the account amount and notes are locked to prevent any changes to the Next Yr Approved 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 Approved field can be changed and notes added or modified. Use the Mass Lock/Unlock utility to lock or unlock the selected account.
Description	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.
Notes	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

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.

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 amounts for the account code is displayed. The amount cannot be changed on this tab.
Next Yr Approved	Type the amount of the approved budget for the selected account code. If the selected account is locked, this field is display only and cannot be changed.
Description	The account description from the chart of accounts is displayed. The information can be changed. The field can be a maximum of 30 characters.
Total	The totals of the amounts in the Next Year Requested and Next Yr Recommend columns of each displayed account code are 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.
Refresh Totals	Click to update the totals.

☐ Click **Save**.

Other functions and features:

Retrieve	The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost.
Print	Click to print the report. Review the report.

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~~HIDEPAGE~~

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:



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.

Details

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.

Field	Description
Last Yr Closing Amt	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.
This Yr Original Budget	The budget amount that was approved for the selected account during the current fiscal year is displayed.
This Yr Amend Budget	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.
This Yr Actual Amt	The amount expended for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.
School Year	The current school year in the YYYY-YYYY format as entered on the District Budget Options table is displayed.
Next Yr Requested	The previously requested budget amount for the selected account code is displayed. The amount cannot be changed on this tab.
Next Yr Recommended	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.
Lock Flag	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.
Description	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.
Notes	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

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.

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.
Refresh Totals	Click to update the totals.

To create a new row using the data from an existing row, select the applicable 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	The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost.
Print	Click to print the report. Review the report.

Requested - BUD3100

Budget > Maintenance > Budget Data - Quick Entry > Requested

This tab is used to enter a requested amount in the **Next Yr Requested** column for account codes. 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 Requested** 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. If an account is locked, the **Next Yr Requested** field cannot be changed. Use the Utilities > 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:

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.

Details	<p>Click  to view any previously entered notes and other details for the associated account code. The Budget Data Details pop-up window opens. The account code number and description are displayed at the top of the window.</p> <p>The Last Yr Closing Amt field displays the amount of the account balance at the end of the previous fiscal year. When the budget is initialized, you can update this amount with either This Yr Amend Budget or This Yr Actual Amt, which would reflect the ending totals for the previous year.</p> <p>The This Yr Original Budget field displays the budget amount that was approved for the selected account during the current fiscal year.</p> <p>The This Yr Amend Budget field displays the amended budget amount for the current fiscal year. When the next year budget is approved and initialized, this amount will be zero.</p> <p>The This Yr Actual Amt field displays the amount expended for the current fiscal year. When the next year budget is approved and initialized, this amount will be zero.</p> <p>The School Year field displays the current school year in the YYYY-YYYY format as entered on the District Budget Options table.</p> <p>In the Next Yr Requested field, type the amount of the requested budget for the selected account code. If the selected account is locked, the field is display only and cannot be changed.</p> <p>The Lock Flag field displays the status of the selected account code.</p> <p>Notes: Use the Mass Lock/Unlock utility to lock or unlock the selected account.</p> <p>If the Lock Flag field is set to Y, the account amount and notes are locked to prevent any changes to the Next Yr Requested field. No changes can be made until the account code is unlocked.</p> <p>If the Lock Flag field is set to N, the account amount and notes are unlocked, and the Next Yr Requested field can be changed and notes added or modified.</p> <p>In the Notes field, type comments, additional justification, or instructions about this account code.</p> <p>Note: 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.</p> <p>Use the following buttons to view other details of other account codes:</p> <p>Click  to view the next account code.</p> <p>Click  to view the previous account code.</p> <p>Click OK to save the changes and close the window.</p>
Account Code	The account code components are displayed.
Next Yr Requested	The previously requested amount for the account code is displayed. The amount can be changed if the account code is not locked.

Description	The account description from the chart of accounts is displayed. The information can be changed. The field can be a maximum of 30 characters.
Total	<p>The total of the amounts in the Next Yr Requested column of each account code is displayed.</p> <p>The calculation of this value 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.</p> <p>Note: No 61XX accounts are displayed on this tab, even if the user profile allows access. This will affect the value displayed in the Total field.</p>
Refresh Totals	Click to update the totals.

☐ Click **Save**.

Other functions and features:

Retrieve	The Retrieve button is also used to retrieve information from the last save. If you click Retrieve , any unsaved changes are lost.
Print	Click to print the report. Review the report.