

Update Budget Data - BUD6000

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This page is used to transfer account codes and amounts from the Finance application to the Budget application master file. The amounts to be used for the update are based on the **Update Column** and the **Accounting Period** selections. Use this option after you have created the Budget master table. If you want to copy additional Fund/Year codes, then you must first use the Create Budget Data page.

Records that exist in the Mass Change Account Codes, Mask Crosswalk option affect the accounts that are created or updated when using this option.

Update budget data:

«screenshot of Update Budget Data»

Field	Description
From GL File ID	Select the prior year from GL file ID. The accounting period values are changed according to the current and next accounting period values for the selected GL file ID.

Click **Retrieve** to update the **Accounting Period** options and fund information.

Select one of the following **Update Column** options:

During budget processing, select **Amended** or **Actual** to update those columns in Budget for the selected fund/year codes.

Original	Select if you have posted Journal Budget or Amended Budget entries to Estimated Revenue or Appropriations, and selected Original Budget Only in the Move Budget to Finance utility. **Note**: If **Capture Original Budget Flag** on District Budget Options is not selected or if **Original Budget Only** on Utilities, Move Budget to Finance is not selected, the original budget amount viewed in Budget Amendment will not display. If one or both of these features has not occurred prior to performing this process, zero amounts or only those amounts that had **Capture Original Budget Flag** selected on journal budget or current year amendment transactions will update the current **Original Budget** field.
Amended	Select if you have posted entries in Journal Budget or Amended Budget to Estimated Revenue or Appropriations and did not select **Original Budget Only** in the Move Budget to Finance utility.
Actual	Select if you have posted entries that have increased or decreased Realized Revenue, Encumbrance, or Expenditures in Finance.

Select one of the following **Account Code** options:

During budget processing, it is recommended that none of the below options are selected.

Include Inactive	Select to include inactive account codes and amounts in the list of available account codes to be transferred. If **Include Inactive** is selected, any inactive accounts and amounts in the prior file ID are copied over. If **Include Inactive** is not selected, inactive accounts and amounts in the prior file ID are not copied over.
Use Crosswalk	Select to crosswalk any account code elements for the selected fund/years that exist in the Mask Crosswalk utility. See Mask Crosswalk (Mass Change Account Codes).
Only Existing Budget Accts	Select to include existing account codes and amounts in the list of available account codes to be transferred.

Select one of the following **Accounting Period** options:

During the budget processing, select **Current** month if the current month and next month are the same. If the current month and next month are different, select **Next**.

Current	The accounting period is set to **Current** by default, which uses the current accounting period amounts from the Finance application to populate the Budget application amounts.
Next	Select to create Budget data using the next accounting period amounts in the Finance application.

Select one of the following **Object Description** options:

Description from GL (New Account Codes)	Select to update the new Budget account code descriptions based on the general ledger description.
Description from GL (All Account Codes)	Select to update the object description for all account codes. This description is retrieved from the Chart of Accounts.
Description from Budget Object Code Table	Select to update the object description for new account codes only.

All available fund/year codes from the Finance application are displayed on the left side of the page. Select the available fund/year codes to move to the right side of the page for the budget account code tables, general ledger accounts. Use the following buttons to move all from left to the right:

 - Click to move selected entries from the left side to the right side of the page.

 - Click to move all entries from the left side to the right side of the page.

 - Click to move selected entries from the right side to the left side of the page.

 - Click to move all entries from the right side to the left side of the page.

Execute	Click to execute the process. The Update Budget Data Report is displayed with the old and new account codes that were updated. Review the report. **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.
Process	Click to update the budget data. A message is displayed indicating that the process was successfully completed. Click **OK**.