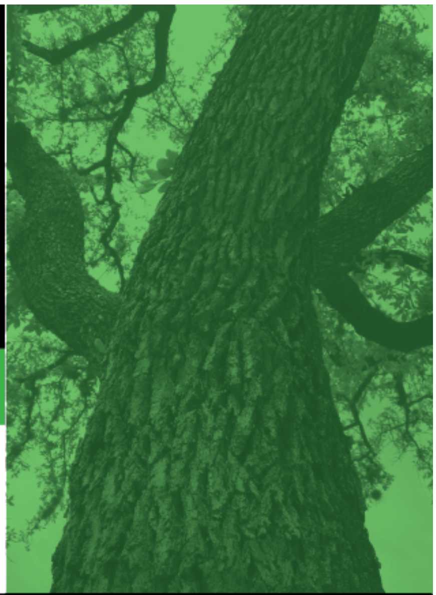
ASCENDER GUIDES



# Budget Amendment Maintenance - FIN8000

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# Budget Amendment Maintenance - FIN8000

***Finance > Budget Amendment > Budget Amendment Maintenance***

This page is used to retrieve, create, save, or delete budget amendments that have been created by the originator or returned by an approver for further modification. The page consists of three sections: amendment information, detail information, and summary information.

When posting transactions on the Budget Amendment Maintenance page, enter an account code in the detail section, and then tab out of the field after making the entry to update the summary account code information.

### Retrieve or create an amendment:

| | | | | |
|---|---|---|---|---|
| **Add** | Add an amendment.<br>Click to add an amendment. Budget amendments can only be created in file ID C. This button is disabled for all prior year file IDs. | OR | **Retrieve an existing record.** | Search for a record.<br>Type the amendment number, if known, using a maximum of six characters. If numeric values only are used, the system zero-fills the number to six digits when the user enters a partial amendment number and tabs out of the field (e.g., the user entered 123, the system zero-fills the field to 000123). If alphanumeric values are used, the system does not zero-fill the amendment number to six characters (e.g., the user entered ABC2, the amendment number remains ABC2).<br>Click **Retrieve**. The amendment numbers are displayed. If the amendment number is not known, click Directory. |

Under **Amendment Information**:

| Field | Description |
|---|---|
| **Amendment Nbr** | Type an amendment number. The field can be a maximum of six characters. Amendment numbers can be alphanumeric. If only numeric values are used, the field is zero-filled to equal six digits when a partial amendment number is entered and you tab out of the field (e.g., you entered 123, the field is zero-filled to 000123). If alphanumeric values are used, the field is not zero-filled to equal six characters (e.g., you entered ABC2, the amendment number remains ABC2).<br>**Note**: Each amendment number entered is validated against existing journal voucher numbers and amendment numbers. If the amendment number entered already exists as either an amendment number or a journal entry number in Finance, the duplicate amendment number cannot be used. Another amendment number can be entered. |
| **Amendment Number Description** | Type a description for the amendment. The description can be a maximum of 30 characters. |
| **Originator** | The name of the person currently logged on to the system is displayed. |

| Field | Description |
|---|---|
| **Campus/Dept** | Type the name of the campus and department submitting the amendment transaction. As you type the data, a drop-down list of first approver campuses is displayed. Select the campus/department. This is a required field. This field only displays on the page when **Allow for Approval Process** is selected on the Tables > District Finance Options page. |
| **Board Approval Required** | Select to prevent the amendment from automatically posting to Finance when the amendment is approved by the final approval (as set up in District Administration). If selected, you must manually post the amendment transaction to the Finance > Budget Amendment > Post to General Ledger page. |
| **Note** | Click to add or read a note for the amendment. An amendment notes pop-up window opens. The text is in the standard font if there are no amendment notes entered. If there is a paper clip next to the button, an amendment note exists.<br><br>In the amendment notes pop-up, type comments, additional justification, or instructions about the amendment transaction.<br><br>Click **OK** to save the amendment notes and close the pop-up. Otherwise, click **Cancel** to close the pop-up without saving the note. |

Under **Detail Information**:

Click **+Add** to add a transaction.

<table>
<tr><td></td><td>Click to view additional information for a transaction.</td></tr>
<tr><td>Account Code</td><td>Type an account code. As you type the data, a drop-down list of corresponding data is displayed. Select an account code from the list.</td></tr>
<tr><td>Description</td><td>The account description from the chart of accounts is displayed. The Description field can only be modified if Allow Account Creation is selected in the District Administration application.</td></tr>
<tr><td>Reason</td><td>If a description exists in the Amendment Number Description field, the description automatically displays in the Reason field. You may change the reason. The reason can be a maximum of 30 characters.</td></tr>
<tr><td>Increase/Decrease Amt</td><td>Type a number which increases or decreases the general ledger for the selected account code. The current account code information is displayed in the summary page. The translation of how increases/decreases become debits/credits is as follows:
<table>
<tr><th>Class Object</th><th>Increase</th><th>Decrease</th></tr>
<tr><td>3XXX</td><td>Credit</td><td>Debit</td></tr>
<tr><td>5XXX or 7XXX</td><td>Debit</td><td>Credit</td></tr>
<tr><td>6XXX or 8XXX</td><td>Credit</td><td>Debit</td></tr>
</table></td></tr>
<tr><td>Trans Date</td><td>The current system date is displayed by default, but it can be modified. If it is modified, all new transactions default to the last transaction date that was entered.</td></tr>
<tr><td>User ID</td><td>The name of the user who created the transaction is displayed. Users are created in the Security Administration application.<br>If a pending transaction overdraws an account, an error is generated to alert the user of the overdrawn condition for the specific account.</td></tr>
</table>

Under **Summary Information**, the account code transactions for all account codes that have been entered for the specified amendment are summarized.

Click **Save**. If the total debit plus credit amounts do not equal zero, a warning message is displayed.

Click **Submit** to submit the amendment for approval. An amendment cannot be submitted if **Allow for Approval Process** is not selected on the District Finance Options > Finance Options tab, and the amendment's funds are not in balance.

## 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. |
| **+Add** | Click to add a row to the grid or press ALT+1.<br>**Note**: When using ALT+1 to add a new row to the grid, you must use the 1 key on the keyboard, not the 1 key on the numeric keypad. |
| **Print** | Click to print data.<br><br>**Review the report using the following buttons**:<br><br>Click to go to the first page of the report.<br>Click to go back one page.<br>Click to go forward one page.<br>Click to go to the last page of the report.<br><br>**The report can be viewed and saved in various file formats**.<br><br>Click to save and print the report in PDF format.<br>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.<br>Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead. |
| | Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.<br><br>Click **Save**. |
| **Documents** | View or attach supporting documentation. |