

Budget Account Codes Inquiry

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This page is used to perform the following functions if you have accounts set up on the District Administration > Maintenance > User Profiles page:

- Review the balance total of an account or group of accounts based on the accounts in the User Profiles page.
- Review the balance summary of an account or group of accounts based on the accounts in the User Profiles page.
- View records on the page or on a printed report.

Perform a budget inquiry:

Field	Description
Summary	Select to create a summary only report, or select **Totals** to create a fund/class totals only report. Both inquiry reports display the values for the following columns: • **Last Yr Closing Amt** • **This Yr Original Budget** • **This Yr Amend Budget** • **This Yr Actual Amt** • **Next Yr Requested** • **Next Yr Recommend** • **Next Yr Approved** **Note**: The data in the **Next Yr** columns is determined by the user's profile in Security Administration.
Exclude Objects 61XX	Select to exclude all object codes that begin with 61.
Account Code	The 20-character account code mask with all Xs is displayed. Only the accounts to which you have access on the Maintenance > User Profiles page in District Administration are displayed in the drop-down lists. Only populate the account code elements to use during the selection process (e.g., if you want a summary of the supply accounts for campus 001, the account mask would be XXX-XX-63XX-XX-001-XXXXXX). Click an account code element to select available accounts to include in the mask. Only those account codes that match the selected account code elements are retrieved.

Retrieve

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.

Reset	❑ Click **Reset** to clear the account code and return to the default setting (all Xs).


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