



# Approved- BUD3000



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## **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:**

<b>Field</b>	<b>Description</b>
<b>Account Code</b>	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.

<b>Field</b>	<b>Description</b>
<b>Lock</b>	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.
<b>Note</b>	The note status of the account code is displayed. Y - Comments exist. N - No comments exist.


Field	Description																										
<b>Details</b>	<p>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.</p>																										
	<table border="1"> <thead> <tr> <th data-bbox="352 271 624 302">Field</th> <th data-bbox="624 271 1474 302">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="352 302 624 443"><b>Last Yr Closing Amt</b></td> <td data-bbox="624 302 1474 443">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 <b>This Yr Amend Budget</b> or <b>This Yr Actual Amt</b>, which would reflect the ending totals for the previous year.</td> </tr> <tr> <td data-bbox="352 443 624 510"><b>This Yr Original Budget</b></td> <td data-bbox="624 443 1474 510">The budget amount that was approved for the selected account during the current fiscal year is displayed.</td> </tr> <tr> <td data-bbox="352 510 624 611"><b>This Yr Amend Budget</b></td> <td data-bbox="624 510 1474 611">The amended budget amount for the current fiscal year is displayed. 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Field	Description
<b>Account Code</b>	Type only the account code elements (e.g., fund, function, or object). Each account code component is independent of the other components. To view a list of account code components, place the cursor in one of the account code component fields, and click <b>Lookup</b> or press F2. A pop-up window is displayed for the applicable account code component.  In the <b>Search</b> field, type the account code component. A list of available account code components is displayed.  Select an account code component from the list. Otherwise, click <b>Cancel</b> to return to the Requested tab.
<b>Next Yr Requested</b>	The previously requested amount for the account code is displayed. The amount cannot be changed on this tab.
<b>Next Yr Recommended</b>	The previously recommended amount for the account code is displayed. The amount cannot be changed on this tab.
<b>Next Yr Approved</b>	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.
<b>Description</b>	The account description from the chart of accounts is displayed. The information can be changed. The field can be a maximum of 30 characters.
<b>Total</b>	The totals of all amounts in the <b>Next Year Requested</b> and <b>Next Yr Recommend</b> 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.
<a href="#">Click Refresh Description.</a> Click after an existing object code number is entered to update the <b>Description</b> field. The object code description is populated from the Object tab.	
<a href="#">Click Refresh Totals.</a> 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**. Prior to saving the record, change the account code of the newly duplicated row.


Click **Save**.

**Other functions and features:**

<b>Retrieve</b>	<a href="#">Retrieve data.</a> The <b>Retrieve</b> button is also used to retrieve information from the last save. If you click <b>Retrieve</b> , any unsaved changes are lost.	
	<a href="#">Delete a row.</a> Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.  Click <b>Save</b> .	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.

**Print**[Print account data.](#)**Review the report using the following buttons:**


Click  to go to the first page of the report.

Click  to go back one page.

Click  to go forward one page.

Click  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.



## Back Cover