



**Requested - BUD3000**



# Table of Contents

**Requested - BUD3000** ..... 1



# 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:**




<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 Requested** and **Description** fields.

<b>Field</b>	<b>Description</b>
<b>Lock</b>	The lock status of the account code is displayed. <i>Y</i> - The account code is locked. <i>N</i> - 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. <i>Y</i> - Comments exist. <i>N</i> - 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 opens. The account code number and description are displayed at the top of the window.</p> <table border="1" data-bbox="319 280 1468 1937"> <thead> <tr> <th data-bbox="319 280 558 320">Field</th> <th data-bbox="558 280 1468 320">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="319 320 558 465"><b>Last Yr Closing Amt</b></td> <td data-bbox="558 320 1468 465">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="319 465 558 539"><b>This Yr Original Budget</b></td> <td data-bbox="558 465 1468 539">The budget amount that was approved for the selected account during the current fiscal year is displayed.</td> </tr> <tr> <td data-bbox="319 539 558 651"><b>This Yr Amend Budget</b></td> <td data-bbox="558 539 1468 651">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.</td> </tr> <tr> <td data-bbox="319 651 558 763"><b>This Yr Actual Amt</b></td> <td data-bbox="558 651 1468 763">The amount expended for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.</td> </tr> <tr> <td data-bbox="319 763 558 837"><b>School Year</b></td> <td data-bbox="558 763 1468 837">The current school year in the YYYY-YYYY format as entered on the District Budget Options table is displayed.</td> </tr> <tr> <td data-bbox="319 837 558 949"><b>Next Yr Requested</b></td> <td data-bbox="558 837 1468 949">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.</td> </tr> <tr> <td data-bbox="319 949 558 1234"><b>Lock Flag</b></td> <td data-bbox="558 949 1468 1234"> <p>If the <b>Lock Flag</b> is set to <i>Y</i>, the account amount and notes are locked to prevent any changes to the <b>Next Yr Requested</b> field. No changes can be made until the account code is unlocked.</p> <p>If the <b>Lock Flag</b> field is set to <i>N</i>, the account amount and notes are unlocked, and the <b>Next Yr Requested</b> field can be changed and notes added or modified.</p> <p>Use the Mass Lock/Unlock utility to lock or unlock the selected account.</p> </td> </tr> <tr> <td data-bbox="319 1234 558 1379"><b>Description</b></td> <td data-bbox="558 1234 1468 1379">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.</td> </tr> <tr> <td data-bbox="319 1379 558 1937"><b>Notes</b></td> <td data-bbox="558 1379 1468 1937"> <p>Type comments, additional justification, or instructions about this account code.</p> <p><b>Notes:</b></p> <p>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.</p> <p>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> </td> </tr> </tbody> </table> <p>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 <b>OK</b> to save the changes and close the window.</p>	Field	Description	<b>Last Yr Closing Amt</b>	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.	<b>This Yr Original Budget</b>	The budget amount that was approved for the selected account during the current fiscal year is displayed.	<b>This Yr Amend Budget</b>	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.	<b>This Yr Actual Amt</b>	The amount expended for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.	<b>School Year</b>	The current school year in the YYYY-YYYY format as entered on the District Budget Options table is displayed.	<b>Next Yr Requested</b>	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.	<b>Lock Flag</b>	<p>If the <b>Lock Flag</b> is set to <i>Y</i>, the account amount and notes are locked to prevent any changes to the <b>Next Yr Requested</b> field. No changes can be made until the account code is unlocked.</p> <p>If the <b>Lock Flag</b> field is set to <i>N</i>, the account amount and notes are unlocked, and the <b>Next Yr Requested</b> field can be changed and notes added or modified.</p> <p>Use the Mass Lock/Unlock utility to lock or unlock the selected account.</p>	<b>Description</b>	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.	<b>Notes</b>	<p>Type comments, additional justification, or instructions about this account code.</p> <p><b>Notes:</b></p> <p>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.</p> <p>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>
Field	Description																				
<b>Last Yr Closing Amt</b>	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.																				
<b>This Yr Original Budget</b>	The budget amount that was approved for the selected account during the current fiscal year is displayed.																				
<b>This Yr Amend Budget</b>	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.																				
<b>This Yr Actual Amt</b>	The amount expended for the current fiscal year is displayed. When the next year budget is approved and initialized, this amount will be zero.																				
<b>School Year</b>	The current school year in the YYYY-YYYY format as entered on the District Budget Options table is displayed.																				
<b>Next Yr Requested</b>	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.																				
<b>Lock Flag</b>	<p>If the <b>Lock Flag</b> is set to <i>Y</i>, the account amount and notes are locked to prevent any changes to the <b>Next Yr Requested</b> field. No changes can be made until the account code is unlocked.</p> <p>If the <b>Lock Flag</b> field is set to <i>N</i>, the account amount and notes are unlocked, and the <b>Next Yr Requested</b> field can be changed and notes added or modified.</p> <p>Use the Mass Lock/Unlock utility to lock or unlock the selected account.</p>																				
<b>Description</b>	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.																				
<b>Notes</b>	<p>Type comments, additional justification, or instructions about this account code.</p> <p><b>Notes:</b></p> <p>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.</p> <p>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>																				

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>	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.
<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 total of the amounts in the <b>Next Yr Requested</b> column of each account code is displayed. 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. <b>Note:</b> No 61XX accounts are displayed on this tab, even if the user profile allows access. This will affect the value displayed in the <b>Total</b> field.
<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.	

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.
-----------------	--

<b>Print</b>	<p><a href="#">Print account data.</a></p> <p><b>Review the report using the following buttons:</b></p> <p>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.</p> <p><b>The report can be viewed and saved in various file formats.</b></p> <p>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 <b>X</b> to close the report window. Some reports may have a <b>Close Report, Exit,</b> or <b>Cancel</b> button instead.</p>	
	<p><a href="#">Delete a row.</a></p> <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 <b>Save.</b></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>



## Back Cover