

Requested - BUD3100

Table of Contents

Requested - BUD3100 1

Requested - BUD3100

Budget > Maintenance > Budget Data - Quick Entry > Requested

This tab is used to enter a requested amount in the **Next Yr Requested** column for account codes. You can quickly enter amounts and notes, and either tab to another row or use the scroll bar to locate accounts. Changes to account codes cannot be made on this tab. If account codes need to be changed, use the Budget Data Maintenance page.

If the **Next Yr Requested** field is locked, changes cannot be made to the amounts or the notes. Accounts can be locked by setting a date on the Tables > Budget Options page. After the set date, the **Next Yr Amount** field is no longer accessible. You can use the Mass Lock/Unlock utility to lock individual accounts and associated amounts and notes.

All available account codes are displayed. If an account is locked, the **Next Yr Requested** field cannot be changed. Use the Utilities > Mass Lock/Unlock utility to lock or unlock the selected account.

Narrow the account code list:

Field	Description
Org	Select an organization code and description for which you want to retrieve account codes.

❑ Click **Retrieve**. All account codes with the selected organization code are displayed.

Review and enter data:

Lock	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.
Note	The note status of the account code is displayed. *Y* - Comments exist. *N* - No comments exist.

Details	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. The **Last Yr Closing Amt** field displays the amount of the account balance at the end of the previous fiscal year. When the budget is initialized, you can update this amount with either **This Yr Amend Budget** or **This Yr Actual Amt**, which would reflect the ending totals for the previous year. The **This Yr Original Budget** field displays the budget amount that was approved for the selected account during the current fiscal year. The **This Yr Amend Budget** field displays the amended budget amount for the current fiscal year. When the next year budget is approved and initialized, this amount will be zero. The **This Yr Actual Amt** field displays the amount expended for the current fiscal year. When the next year budget is approved and initialized, this amount will be zero. The **School Year** field displays the current school year in the YYYY-YYYY format as entered on the District Budget Options table. In the **Next Yr Requested** field, 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. The **Lock Flag** field displays the status of the selected account code. **Notes**: Use the Mass Lock/Unlock utility to lock or unlock the selected account. If the **Lock Flag** field is set to *Y*, the account amount and notes are locked to prevent any changes to the **Next Yr Requested** field. No changes can be made until the account code is unlocked. If the **Lock Flag** field is set to *N*, the account amount and notes are unlocked, and the **Next Yr Requested** field can be changed and notes added or modified. In the **Notes** field, type comments, additional justification, or instructions about this account code. **Note**: 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. 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 **OK** to save the changes and close the window.
Account Code	The account code components are displayed.
Next Yr Requested	The previously requested amount for the account code is displayed. The amount can be changed if the account code is not locked.

Description	The account description from the chart of accounts is displayed. The information can be changed. The field can be a maximum of 30 characters.
Total	The total of the amounts in the **Next Yr Requested** 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. **Note**: No 61XX accounts are displayed on this tab, even if the user profile allows access. This will affect the value displayed in the **Total** field.
Refresh Totals	Click to update the totals.

❑ Click **Save**.

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.
Print	Click to print the report. Review the report.


ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS
ASCENDER GUIDES
ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS

Back Cover