

Reinitialize Budget Data - BUD6200

Table of Contents

Reinitialize Budget Data - BUD6200 1

Reinitialize Budget Data - BUD6200

Budget > Utilities > Reinitialize Budget Data

Due to the effects this process has on the Budget file, it is imperative that you back up the Budget file before starting the reinitialization process.

This page is used to prepare the Budget file for the next school year. This process is run when the final budget has been adopted and posted to the general ledger. Amounts are maintained in order to create a budget history in the Budget master file. When reinitializing budget data, you can specify the funds you wish to shift, or you can select all funds. The following changes are made:

- The value in the **This Yr Amend Budget** or the **This Year Actual Amt** field is moved to the **Last Yr Closing Amt** field replacing the value from the previous year.
- The value in the **Next Yr Approved** field is moved to the **This Yr Original Budget** field replacing the value from the current year.
- The values for the following fields are set to zero:
  - **This Yr Amend Budget**
  - **This Yr Actual Amt**
  - **Next Yr Requested**
  - **Next Yr Recommend**
  - **Next Yr Approved**

Reinitialize the budget data:

Under **Amt to use as Last Yr Closing Amt**, select one of the following:

- **This Yr Expenditures** - Recommended option.
- **This Yr Amended Budget** - Select this option to update the column with amended budget data.

All available fund/years are displayed on the left side of the page under **Fund/Yrs Available**. Select the fund/years to be reinitialized and use the following buttons to move the selected fund/years to the right side of the page under **Fund/Yrs to Initialize**.

 - Click to move selected entries from the left side to the right side of the page.

 - Click to move all entries from the left side to the right side of the page.

 - Click to move selected entries from the right side to the left side of the page.

 - Click to move all entries from the right side to the left side of the page.

Execute	Click to execute the process. The Budget System Reinitialize Funds Change report is displayed. 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.
Process	Click to reinitialize the selected account data. A message is displayed indicating that the process was successfully completed. Click **OK**.
Cancel	Click to return to the Reinitialize Budget Data page without completing the reinitialization process.


ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS
ASCENDER GUIDES
ASCENDER
ELEVATING TECHNOLOGY SOLUTIONS

Back Cover