Central Budget Entry

Overview

The Central Budget Entry program serves as a consolidated resource for maintenance and completion of budget projections. The program enforces maximum threshold amounts and budget access dates, and produces department notifications. Central Budget Entry applies all Munis Workflow business rules defined by your organization, as well as all role-based security settings.

🔆 Central Budget En	n try Sear	ch Projection	Accounts							۹	0 🚺
/iew All Advanced Change Ad Projection Acco	id Delete Mass D	lelete Mass 🔻	Add Attac Analysis Tile	h * Department Excel I		Lccount Project Proje Central Master Budg	ect Budget Budget	Monthly Amounts			
Projection 19001 - 2019 Opera	ating Budget		Current Level: DEP/	ARTMENT	DEF	ARTMENT Total: \$1	1,022,822,913.74		DEPARTMENT Due:	Unavailable	
Accounts (354)	Positions	I	Projection Totals	Analysis							
Account	I	Description		2019 DEPARTMENT	2020 DEPARTMENT	2017 Projected	2017 Original	2017 Revised	2017 Actuals	2016 Original	2016 Revised
Totals				-5,034,675,806.56	0.00	-5,034,928,408.21	-5,034,819,295.53	-5,034,438,434.49	17,209.06	0.00	0.00
+ /	1	TELEPHONE		3,929.63	0.00	4,172.13	3,929.63	4,172.13	0.00	0.00	0.00
+ /	6	PROFESSIONAL I	DEVELOPMENT	1,358.70	0.00	1,408.70	1,358.70	1,408.70	0.00	0.00	0.00
F /	1	MISCELLANEOUS	5 EXPENSES	36,750.00	0.00	36,750.00	36,750.00	36,750.00	260.00	0.00	0.00
F /	c	OFFICE SUPPLIES		28,865.85	0.00	31,235.35	28,865.85	30,435.35	0.00	0.00	0.00
• /	(CLOTHING		4,725.00	0.00	4,725.00	4,725.00	4,725.00	0.00	0.00	0.00
1		NSURANCES		15,750.00	0.00	15,750.00	15,750.00	15,750.00	0.00	0.00	0.00
• 1	F	RETIREMENT		13,062.00	0.00	13,062.00	13,062.00	13,062.00	0.00	0.00	0.00
- /	1	NTEREST/FEE RE	VENUE	0.00	0.00	-52,500.00	-52,500.00	-52,500.00	0.00	0.00	0.00
- /	c c	GRANT REVENUE		-3,675,000.00	0.00	-3,675,000.00	-3,675,000.00	-3,658,400.00	0.00	0.00	0.00
- /	1	MARRIAGE LICEN	ISE	-34,125.00	0.00	-34,125.00	-34,125.00	-34,125.00	0.00	0.00	0.00
- 1	c	SENERAL BILLIN	G REVENUE	-383,250.00	0.00	-383,250.00	-383,250.00	-500,000.00	0.00	0.00	0.00
- /	F	PERMITS		-1,386,583.80	0.00	-1,386,583.80	-1,386,583.80	-1,386,583.80	0.00	0.00	0.00
. /	1	ANIMAL LICENSE		-37,380.00	0.00	-37,380.00	-37,380.00	-37,380.00	0.00	0.00	0.00
. 1	1	TAX LIEN REVEN	UE	-1,417,500.00	0.00	-1,417,500.00	-1,417,500.00	-1,417,500.00	0.00	0.00	0.00
· /	E	BUSINESS LICEN	SE REVENUE	-1,424,498.25	0.00	-1,424,498.25	-1,424,498.25	-1,424,498.25	0.00	0.00	0.00
											÷.
← 1 2 3 4 5 →										Sav	e Changes Canc

Use Central Budget Entry to enter budget amounts by department, and then view those amounts by account, project string, employee, or position. You cannot create entirely new projections in this program. All projections must be created in the Define/Start Budget Projection program. When you export project budget package or salary and benefit projection information to a general ledger budget projection, that information is also available in Central Budget Entry.

The Central Budget Entry screen manages and presents data by Accounts, Positions, Projection Totals, and Analysis.

Accounts (22)	Positions	Projection Totals	Analysis
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- Accounts Tab—Displays a variety of amount and account columns.
- Positions Tab—Provides position totals for projections that include salary information.
- Projection Totals Tab—Calculates and displays subtotals by any general ledger or project ledger segments.
- Analysis Tab—Provides comparisons of budget amounts by a specific row and column. For example, to view budget totals by Agency and Service, select Agency as the row and Service as the column.



General Procedures

The toolbar for the Central Budget Entry program provides search, data management actions, display settings, and access to details in related Munis programs.

1	Centra	l Budge	t Entry	Search Pi	rojection	Accounts									۹
	e,			N	a		Ø	ė	52	_			 ₽ ₽		
View All	Advanced	Change Projection	Add Account	Mass Delete Accounts		Add Analysis Tile	Attach 🔻	Department Notify	Excel Export	E-mail Link	Account Columns			Budget Scenarios	Monthly Amounts

- To filter the accounts displayed on the screen, enter a value in the Search box or use the Advanced search option to define more specific criteria.
- To add or update budget details, use the Add Account, Delete Account, Mass Delete Accounts, or Mass Update options.
- To attach detail files, send department notifications, export data to Excel, or create email messages with budget links, use the Attach, Department Notify, Excel Export, and E-mail Link options.
- To change the account columns that display on the Accounts tab, use the Account Columns option. Select the check boxes for each column to display, and clear the check boxes for columns to hide. Alternatively, click Select All or Unselect All to select or clear all check boxes.
- To open related budget management programs in Munis, use the Account Central, Project Master, Project Budget, Budget Reports, Budget Scenarios, and Monthly Amounts options. For example, click Budget Reports to open the Next Year Budget Reports program.

Accounts Tab

The Accounts tab is the default active tab when you open the Central Budget Entry program. This tab provides the details for all the accounts included in the selected projection. From this tab, you can maintain budget amounts within the accounts.

Add Detail 🕇

When you click the Add Detail button for an account, the program provides the Details pane. Click the Add Detail button in the Actions group of the toolbar to complete the budget detail entry.

Add Notes 🖉

The Add Notes button displays for each individual account. Clicking this button displays the Projection Accounts Notes dialog box, where you can enter notes for the selected account.

View Detail

Once you have added detail for an account, the Add Detail button updates to become the View Detail button. When you click View Detail, the program displays the Details pane. In this view, the Details



pane includes the Add Detail button, which presents the Budget Detail dialog box for review or update.

🔆 Central Budget Entry	Search Pro	ojection Accounts								۹	? 🚺
	Attach - Exce	el E-mail Account	Project Project Master Budget	Budget Budget Reports Scenarios	Monthly Amounts	Return					
Accounts 354	< 1 >	Details 1								2019 Amounts	\$100,000.00
INSURANCES		Year Peri	iod Line	Description		Amount	Quantity	Unit Cost UOM	Location Positi	ion Employee	
RETIREMENT		2019 1	10			100,000.00	1.00	100,000.00	0	0	
INTEREST/FEE REVENUE		Budget Detail								<pre> Previous Next > </pre>	
GRANT REVENUE									Description		
MARRIAGE LICENSE		Year	2019			Vend	ior #	Q	Description		
GENERAL BILLING REVENUE		Period	1			Commod	ity	Q			
PERMITS		Quantity	1			Inventory Ite	em #	Q			
ANIMAL LICENSE		Unit Cost	\$ 100,000			UC	M		Justification		Æ
TAX LIEN REVENUE		Amount	\$ 100,000			Freig	ght 0	96			
BUSINESS LICENSE REVENUE		Projected	\$			E	Bid #	Q			
EMPLOYER PAID EXPENSES						As	set #	Q			4
EMPLOYER PAID EXPENSES		Request Group		۹		10			Classification		
NC COUNTY TAX		User Defined		Q					Classification New item in existing	program 🔻	
NC STATE TAX									One-Time Expense	diture Or Revenue	
EMPLOYER PAID EXPENSES		Project String				Q			Priority Item		
EMPLOYER PAID EXPENSES											_
		-								Save and close Close	۰ <u> </u>

Positions Tab

To view position totals:

- 1. Click the Positions tab.
- 2. Use the Search Criteria lists to determine the detail levels to display.

1	Central	Budge	t Entry		Search F	Projection	Accounts											۹		?	
View All	€ Advanced	Change Projection	Add Account	Delete Account	Mass Delete Accounts	Mass 🗸	Add Analysis Tile	Ø Attach ▼	Department Notify	Excel Export	E-mail Link	Account Columns	Account Central	Project Master	Project Budget	Budget Reports	Budget Scenarios	Monthly Amounts			
> Pr	ojection 959	953 - MULT	I YEAR		c	Current Lev	el: DEPT ENT	RY		DEF		Y Total: \$1,3	359,500.00			DEPT	ENTRY D	ue: Unav	ailable		
	Accounts (2	22)		Positio	ns	F	Projection To	tals	4	Analysis											
Searc	h Criteria																				
			* >			• >			• >			,	Lo	ad Data	Start o	wer					
Code		Desc	ription						c	Quantity			Sala	ry			Benefits				Total
		_													_						
<	1 >																				

1. Click Load Data.

The program applies the level criteria and displays the position amounts.

- 2. Select a value in the selected level column (for example, if the search criteria level is Position, click the position code) to advance to the next level in the sequence.
- 3. Click Start Over to clear the search criteria.



Projection Totals Tab

To view projection totals:

- 1. Click the Projection Totals tab.
- 2. Use the lists in the Search Criteria group to select up to four segment codes for which to view subtotals. The program displays the totals for the first segment, and then allows you to view additional totals for each segment by clicking through the segment order.

- 🌾	Centra	Budge	t Entry	,	Search P	rojection /	Accounts											۹	e		T
View All	⊕ Advanced	Change Projection	Add Account	Delete Account	Mass Delete Accounts	Mass Update	Add Analysis Tile	Attach 👻	🖄 Department Notify	Excel Export	D E-mail Link	Account Columns	Account Central	E Project Master	Project Budget	Budget Reports	Budget Scenarios	Monthly Amounts			
> Pi	rojection 95	953 - MULT	I YEAR		C	urrent Leve	I: DEPT ENT	RY		DEP	T ENTRY	' Total: \$1,3	59,500.00			DEPT	ENTRY D	ue: Unavail	able		
	Accounts (22)		Positio	ns	P	rojection To	tals	4	Analysis											
Sear	ch Criteria																				
			v >			• >			• >			•	Loa	ıd expense	totals	• Co	lumns	Start over			
Code		Descrip	tion				20	17 DEPT EN	TRY 2	017 Dept	MGR	2017 F	INANCE	2017	ADMIN R	EVW	2017	ADOPTED	2018 D	ept en	ITRY
<	1 >																				

- 3. From the Load Totals list, select to load expense, revenue, or all totals. The program loads the projection totals.
- 4. Use the Columns option to add or remove detail columns.
- 5. Click a code in the segment column to view the subtotals for the next segment subordinate to that code. For example, if you selected Fund and then Department from the Search Criteria lists, click a Fund code to refresh the page to display all departments in that fund.
- 6. Click Start Over to clear the search criteria.

Analysis Tab

To add or view analysis tiles:

1. Click the Analysis tab.

The program refreshes the screen to display the tab and any created tiles. If tiles have not been created, a message displays.

\$	Centra	Budget	t Entry		Search P	rojection	Accounts											۹		?	T
Uiew All	(D) Advanced	Change Projection	Add Account	Delete Account	Mass Delete Accounts	Mass Update	Add Analysis Tile	Attach 🔻	Department Notify	Excel Export	E-mail Link	Account Columns	Account Central	Project Master	Project Budget	Budget Reports	Budget Scenarios	Monthly Amounts			
> pr	ojection 95	953 - MULTI	YEAR		с	urrent Lev	vel: DEPT ENT	RY		DEF		' Total: \$ 1,3	59,500.00			DEPT	ENTRY D	ue: Unavail	able		
🔺 No I	Accounts (ve been d	Positic			Projection To s Tile" from th			Analysis											
	5.			,		,			5												



2. To add tiles, click Add Analysis Tile in the toolbar. The program displays the New Analysis Tile dialog box.

New Analysis Tile	
Name	
Row	•
Column	T
Ok	Close

- 3. Assign a tile name, and then select the row and column values.
- 4. Click Ok.

The program creates the tile and displays it on the Analysis tab.



Budget Entry Procedures

There are two methods for entering budget requests into Central Budget Entry: Amount Entry and Detail Entry. With Amount Entry, a flat dollar amount is entered as an account's requested budget. With Detail Entry, detail lines are added for each account, and the requested budget reflects the total of all the detail lines.

Amount Entry

To enter budget using Amount Entry:

- 1. Open the projection for which to add budget amounts.
- 2. From the Accounts tab, click the budget amount to modify, and then enter the new or updated amount.

08 🖉		INSURAN	CES	100,000.00	0.00	15,	750.00	15,750.00	15,75	0.00	0.00		0.00	0.00	
+ 1		RETIREME	NT	13,062.00	0.00	13,	062.00	13,062.00	13,06	2.00	0.00		0.00	0.00	
+ /		INTEREST/	FEE REVENUE	0.00	0.00	-52,	500.00	-52,500.00	-52,50	0.00	0.00		0.00	0.00	
+ /	De 🖉		INSURANCES	100,000.00		0.00	15,750.00	15	,750.00	15,750.00		0.00	0.00		0.00
	+ /		RETIREMENT	 20000		0.00	13,062.00		,062.00	13,062.00		0.00	0.00		0.00
	+ /		INTEREST/FEE REVENUE	0.00		0.00	-52,500.00	-52	,500.00	-52,500.00		0.00	0.00		0.00
	+ /		GRANT REVENUE	-3,675,000.00		0.00	-3,675,000.00	-3,675	,000.00	-3,658,400.00		0.00	0.00		0.00

- 3. Press Enter to advance to the next account.
- 4. When you have finished entering budget amounts, click Save Changes. The program updates the adjusted fields and recalculates the budget total.

Detail Entry

To enter budget using Detail Entry:

- 1. Open the projection for which to add budget amounts.
- 2. From the Accounts tab, click the Add Detail button for the account to update. The program refreshes the screen to display the Details group.

🌾 Central Budget Entry	Search Proj	ection Acco	ounts									۹	0 🚺
Change Add Copy Delete Mass Dele rojection Detail Detail Detail	e Attach T Excel		Account Project Central Master			Monthly Retu Amounts							
Accounts (354)	< 1 >	Deta	ils 🗿								ž	2019 Amo	unts \$0.00
CLOTHING		Year	Period	Line	Description		Amount	Quantity	Unit Cost UOM	Location	Position	Employ	ee
INSURANCES	06												
RETIREMENT													
INTEREST/FEE REVENUE													
GRANT REVENUE													
MARRIAGE LICENSE													
GENERAL BILLING REVENUE													



3. Click Add Detail on the toolbar.

The program displays the Budget Detail dialog be Budget Detail	JA.
Choose the detail type that you'd like to associate with the selected budget projection a	ccount.
Operating/Capital This option allows entry to generic fields used to calculate unit costs, quantites, and amounts.	Salary This options allows entry of Payroll information in addition to those fields available for the general detail record.
Add Detail	Add Detail

4. Click the Add Detail button in either the Operating/Capital or Salary column depending on the type of detail to create.

The program refreshes the dialog box to display the detail entry fields. The required details vary based on the type of budget detail you selected.

Budget Detail									
Туре	Benefit	Job	c	Description	<u> </u>				
Year	2019	Group	0	٩					
Period	1	Grade	Budget Detail						
Quantity	1	Step	Year	2019		Vendor		Q	Description
Unit Cost	\$ 0	Location	Period	1		Commodity		Q	
Amount	\$ 0	P/R Projection	Quantity	1		Inventory Item	8	٩	
Projected	\$	Position	Unit Cost	\$ 0		UOM			Justification
Request	٩	Employee	Amount	\$ 0		Freight	96		
Group		Benefit	Projected	s		Bid		Q	
User Defined	Q			Q		Asset		Q	ß
Project String		٩	Request Group	4					Classification
			User Defined	Q					One-Time Expenditure Or Revenue
			Project String		٩				Priority Item
									Save and close Close

- 5. Complete the fields to define the budget detail line. If you enter invalid values, the program outlines the fields in red and disables the Save and Close button until corrections are made.
- Click Save and Close. The program saves your entry, refreshes the screen to display the newly created detail line, and updates the detail total.
- 7. When you have finished adding detail lines, click Return on the toolbar to return to the main program screen.
- 8. For each account that you added detail lines, the program replaces the Add Detail button with a View Detail button.
- To review added details, click the View Detail button.
 The program displays the Details group with the updated information.



Next Year Budget Entry

Objective

This document provides instructions on how to enter next year budget requests.

Overview

Departments are responsible for submitting level 1 budget requests to the budget office. This document outlines the entry of next year budget requests using Munis budget detail and the submission of these records to initiate the review process.

Prerequisites

Before you can successfully complete this process, you must ensure that roles granting the necessary permissions have been assigned to your user account. If the roles have not been established, contact the system administrator to have them updated or added into the Munis system.

Confirm the following:

- You have permission to enter budget level 1 requests and the capability to view, create, modify, and delete budget records.
- A projection has been generated by budget staff through the Define/Start Budget Projection program, and set as the default projection in the Budget Settings program.



Procedure for Detail Entry

To add next year budget requests into Munis:

 Open the Next Year Budget Entry program.
 Financials > Budget Processing > Next Year Budget Entry The program initially displays the Account Find screen.

. •	Find		•	?	T
	O ancel				
Define Projection					
Projection number Budget level * Hide Budget Detail Filter By Amount	19001 2019 Ope 1 - DEPARTMENT Calculatio	rating Budget n Method 1 - Current Budget		•	
Segment Name					
Organization					
Fund					
Function/CC					
Department					
Program					
Grade					
Grant/FunSrc					
DOE Function					
DOE Function Category					
Category					
Category Object					
Category Object Project					
Category Object Project Account Type					

Enter the projection number and budget level for which to add detail.

2. Click Accept.

The program makes the Account Find Criteria group accessible for entry.

 Complete one or more of the fields to define the search criteria, and then click Accept. The program displays the Next Year Budget Entry screen, which includes all the accounts that you have role-based permission to access that meet your search criteria.

Ŷ.	Next Ye	ar Budg	et Ent	ry																			٠	•	
€ Back	Accept	Q Search	+ Add	Update	Outp		Display	DF PDF	Save	Excel	Word	🖂 Email	Schedule	<i>A</i> ttach	G GL Account Inquiry	Detail Info	Detail Entry	Text/Notes	Percent Update	Account Info	Projected Refresh	(Approve	Department Notify	Menu T	
rrent	Projection: 19	001 2019 Op	perating E	Budget Ad	ccess level	DEPARTM	ent																		
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	4 COL	JNCIL								.0	00														-
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xt	Org	Object	Pro		Description	n			2019	DEPART	VIENT Amo	ount	2019 FI	NANCE DR.	Amount	2019 BUD(GET MTG Ar	nount	2019	COUNCIL A	mount	2019	ADOPTED	Amount	
	01155000	5400			OFFICE SU	IPPLIES					5,000				.00			.00			.00			.00	
	01155000	7460	A11		SUPPLIES							.00			.00			.00			.00			.00	
	1 1000	32250 4100				al Services						.00.			.00.			.00. .00			.00. .00			.00. 00.	
	1000	4100				Y REVENU					-262.500				.00			.00			.00			.00	
	1000	4103			GRANT RE		c				-3,675,000				.00			.00			.00			.00	
	1000	4110			MARRIAG						-34,125				.00			.00			.00			.00	
	1000	4120					ICENSE REV	/			-37,800				.00			.00			.00			.00	
	1000	4200				BILLING RE		· ·			-383,250				.00			.00			.00			.00	
	1000	4200			OLIVEIVAL	DICENSONE	VENUE				- 303,230	0.00			.00			.00			.00				•
ar	Ln S	Sea P	Period	Proj Qty		Proj Amt		DEF	ARTMENT	Otv		DEP	ARTMENT	Unit Cost	DE	PARTMENT	Amount		FINANCE E	OR Otv		FINANO	CE DR Unit C	ost	
real	5	ieq r	enou			rioj Ant		DLF	ANTIMENT	Qty		DEF	ANTIVIENT	onit cost	00	ARTIMENT	Amount			JIC QLY		TINAN	LE DI OTILI C	.031	
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4. To view account detail, click an account line and then click Account Info in the toolbar. The program displays the Account Info screen.

🔆 Account Infe	t Version												٠	8	
e Q E Back Search Browse	Add Update Delete	Dutput Print D	isplay PDF	Save	Excel	Word	Email Schedule	Ø Attach		D P il Find Percent Update	View Audits E	Description			
Current Projection: 19001 20 Account 01155000	19 Operating Budget Access leve	FFICE SUPPLIES													A
															. 1
Budget Levels							Text/Notes								- 8
DEPARTMENT *	2019 Budget 5,000.00 🖿	2020 Budget		•			Text								- 1
FINANCE DR BUDGET MTG	 00. 00. 	00. 00.													- 1
COUNCIL ADOPTED	 00. 00. 	00.					Notes								- 1
Projected actual	.00 🖬														
				•											
	nly Amounts 🛛 📽 Statistics 🖉 Re	fresh Projected		•											
		fresh Projected		·			Historical B	udget Amount	5						
Budget Detail Budget Detail	ily Amounts 🛛 🖨 Statistics 🗍 🛱 Re 2018	fresh Projected		·				-	Budget	Actua	96	Used			
Budget Detail Month Current Amounts Original budget Revised budget	Ally Amounts Statistics S Re 2018 .00 .00	fresh Projected		·			2015 2016	-	I Budget .00 .00		96	.00			
Budget Detail Green Amounts Original budget Revised budget Budget less cfwd	Ily Amounts E Statistics E Re 2018 .00	fresh Projected		•			2015	-	l Budget .00	Actua .00		.00			
Budget Detail Budget Detail Griginal budget Revised budget Budget less cfwd Current actual Actual less cfwd	2018 2018 00 00 00 00 00 00 00 00 00 0	fresh Projected		•			2015 2016 2017	-	.00 .00 .00	.00		.00 .00			
Budget Detail Month Current Amounts Original budget Revised budget Budget less chvd Current actual Actual less chvd Encumbreq less chvd	2018 00 00 00 00 00 00 00 00 00 00 00 00 00	fresh Projected		·			2015 2016 2017	-	.00 .00 .00	.00		.00 .00			
Budget Detail Month Current Amounts Original budget Revised budget Budget less chvd Current actual Actual less chvd Encumbreq less chvd	2018 00 00 00 00 00 00 00 00 00 0	fresh Projected		•			2015 2016 2017	-	.00 .00 .00	.00		.00 .00			
Budget Detail Budget Detail Griginal budget Revised budget Budget less cfwd Current actual	2018 00 00 00 00 00 00 00 00 00 00 00 00 00	fresh Projected					2015 2016 2017	-	.00 .00 .00	.00		.00 .00			
Budget Detail Month Current Amounts Original budget Revised budget Budget less cfwd Current actual Actual less cfwd Encumb/req less cfwd Encumb/req less cfwd Projection Totals	2018 00 00 00 00 00 00 00 00 00 00 00 00 00	freih Projected		Change .00			2015 2016 2017	-	.00 .00 .00	.00		.00 .00			
Budget Detail Month Current Amounts Original budget Revised budget Budget less chwd Current actual Actual less chwd Actual less chwd Available budget Projection Totals Current budget	Ally Amounts Statistics S Re 2018 00 00 00 00 00 00 00 00 00 00 00 00 00		.56	Change			2015 2016 2017	-	.00 .00 .00	.00		.00 .00			

The Account Info screen provides information specific to the account at the top of the screen. It presents any current year data including the original budget, any revisions, actual amounts, and encumbered expenses. This may be useful for analysis and forecasting what should be requested for the new budget year.

Click GL Account Inquiry on the toolbar to display the Account Inquiry screen to view summarized and detail history for the account for up to four years, as well as information on the current available budget. The program also features the 4 Year Graph and History Graph tabs to view graphs of the historical account data. You cannot modify data in this program, but you can view data and create



reports of collected data.





To add budget requests:

On the Next Year Budget Entry screen, click Detail Info. The program displays the Detail Info screen.

Accept Search Projection: 19001 2019 Opera Level Description 1 DEPARTMENT 2 FINANCE DR 3 BUDGET MTG 4 COUNCIL 5 ADOPTED		evel: DEPARTMEN	Display F	DF Save	Excel	🖫 🖂 🐯 Word Email Schedule	Attach GL Acco		ntry Text/Notes Percent Update			
Level Description 1 DEPARTMENT 2 FINANCE DR 3 BUDGET MTG 4 COUNCIL	🔆 Detail In		ιT		-							
1 DEPARTMENT 2 FINANCE DR 3 BUDGET MTG 4 COUNCIL	5455	ıfo			-							
4 COUNCIL	← 🗉							•			٥	0
	Back Browse	+ 😿 Add Updab	e Delete	Ø Attach	Approve							
(Current Projection: 190	001 2019 Operati	ng Budget A	ccess level: Di	EPARTMENT							
A	Account Project String					OFFICE SUPPLIES						
Org Object 01155000 5400 01155000 7460 11 322250 1000 4100 1000 4100 1000 41100 1000 4110 1000 4120 5 1000 4120 5 1000 4210 1000 4200 1000 400 1000 400 1000 4000 1000 4000 1000 40000	Requested Year Line Sequence Period I Is this a 1-time exp Period Request group User-defined Approval Status Quantity Unit cost Total Totals	enditure or rever	lue?		;	Requested Description				Position Job Class Group Grade/Step Location Position Position Employee Number Beneft/Deduction Payroll Projection		w
C F B C A	DEPARTMENT FINANCE DR BUDGET MTG COUNCIL ADOPTED Projected actual		Qty		Amour	Account totals						

5. Click Add.

The program displays the Detail Add dialog box.

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- 6. Select the type of detail to add, and then click OK. The program makes the fields on the Detail Info screen accessible.
- 7. Complete the fields to enter initial budget requests within the defined target using a detail record for each account. Click Accept to save the new detail record.
- 8. If any changes need to be made to the specific record, click Update to modify the available fields, and then click Accept to save the changes.
- 9. If additional detail records need to be added for this account, click Add and repeat the applicable steps until all detail records have been added and saved, and the desired requested budget amount is reflected in the Account Totals box.
- 10. Click Back to close the Detail Info screen and return to the Next Year Budget Entry screen to review totals entered for this account.



Procedure for Quick Entry

To add next year budget requests into Munis:

 Open the Next Year Budget Entry program.
 Financials > Budget Processing > Next Year Budget Entry The program initially displays the Account Find screen.

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Enter the projection number and budget level for which to add detail.

2. Click Accept.

The program makes the Account Find Criteria group accessible for entry.

 Complete one or more of the fields to define the search criteria, and then click Accept. The program displays the Next Year Budget Entry screen, which includes all the accounts to which you have role-based permission to access and that matched your search criteria.
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- 4. Highlight the account for which to enter budget amounts and click Update. The program moves the pointer to the level 1 field of the selected account for entry.
- 5. Enter the amount to request for this specific account number, and then press **Tab** to move to the next account number. If the account requires budget detail information, the program moves the pointer to the Detail Info line after you enter the dollar value.
- 6. Enter the quantity and amount of each item comprising the total amount requested in the Account detail. For example, if you enter \$10,000.00 in the Account group, you need to enter Account Detail that totals this amount.
- 7. Click Accept to save the details.

To make changes to the detail lines:

1. Click Detail Entry in the toolbar.

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2. Enter the changes, and then click Accept to save.

Send Notification of Budget Changes

Once departmental budgets have been entered and reviewed, you must notify the budget office that level 1 budget entry has been completed.

To send workflow notification of budget requests:

1. With the projection open on the Next Year Budget Entry screen, click Department Notify on the toolbar.

The program displays the Department Notify screen, which contains the default department code associated with your user profile in the Department Code box.

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- 2. Confirm your department code or click the field help button to select the code from a list.
- 3. Click Accept.

The program displays a confirmation message.

4. Click Yes to continue.

The program generates the notification email to the budget office approver indicating that your department has completed budget entry for level 1.

Results

Departmental budget requests have been entered for level 1. Budget staff has been notified that level 1 entry has been completed, and access to the budget projection will be restricted once the level 1 cutoff date defined by the budget calendar is reached.

Status Change

There is no status change to this record.

What's Next?

Level 1 budget amounts for this projection are now available for reporting within the Next Year Budget Reports program. Until the level 1 cutoff date is reached, the projection is available for any changes to



be made to next year budget requests. Salary and benefits information will be generated from the Payroll/Human Resources department and linked to the budget projection for reporting purposes.

The Budget office will roll the level 1 amounts to level 2 as the budget process continues. Any approvals, denials, or changes made by each governing body will be reflected in this projection at the appropriate level. Upon adoption, the final projections will be posted to the master so that departments or agencies can enter transactions against the funds. The Budget Completion Journal will be posted as part of the year-end close process, at which time the journal entries are created to post the original budgets for all accounts.



Budget Transfer and Amendment Process

Objective

This document provides instructions for entering a budget transfer or amendment.

Overview

The Budget Transfers and Amendments program performs current year budgetary transactions. This may reduce one budget line and increase another, or subtract from the bottom line budget amount for either revenue or expense accounts.

Prerequisites

Before you can successfully complete this process, you must ensure that roles granting the necessary permissions have been assigned to your user account. If the roles have not been established, contact the system administrator to have them updated or added into the Munis system. Confirm the following:

- You have appropriate user and account permissions and access.
- Applicable workflow settings and business rules are established for the transfer and amendment process.
- The Munis chart of accounts is in place.

Procedure

To add a budget transfer or amendment:

1. Open the Budget Transfer and Amendments program. Financials > Budget Processing > Budget Transfers and Amendments

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- 2. Click Add.
- 3. Complete the fields in header information for the budget transfer or amendment. Click Accept. The program displays the Budget Amendment Detail Lines screen.

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- 4. Complete the fields, for the detail lines for the budget transaction.
- 5. Click Accept to save the changes.
- 6. Review and confirm all account and totals information.
- 7. Click Back on the toolbar to return to the Budget Transfers and Amendments screen.
- 8. If changes need to be made to the detail lines prior to release, click Lines on the Budget Transfers and Amendments screen to display the Budget Amendment Detail Lines screen, and then click Update on the toolbar to modify detail lines.
- 9. Click Attach to attach any supporting documentation files.
- When the transaction is complete, click Release on the Budget Transfers and Amendments screen to initiate the workflow approval process.
 The transaction will be reviewed and posted upon final approval.

Results

The transaction has been entered and released through the appropriate approval process. To review where the transaction stands in the approval process, click the Approvers button on the Budget Transfers and Amendments screen. The program displays a screen showing the required path and the current approval level.

Status Change

The transaction's status is updated to Pending Approval. When this record has been approved at the final level, the status is updated to Approved.

GL Impact

The general ledger is not affected by this action. Once this record has been approved, it must be posted by budget staff, at which time the budgetary transaction will affect the general ledger.



What's Next?

This record has been released through a workflow process. Required approvers must review each transaction and take appropriate action based on the information entered, and based on supporting documentation. Once the final approval has been granted, the transaction must be posted to affect the general ledger budget figures.