Budget Item Detail

AFD-47 and AFD-48

Introduction

Improvements have been made to Budget Management. A new **Edit** button has been added to the Budget Items tab where budget line items can be added for the account code and the total of the budget line items will be the amount listed in the Proposed Budget column.

Budget Management

From the Budget & GL > Budget Management screen users will be able to use the new **Edit** feature within the **Budget Items** screen.
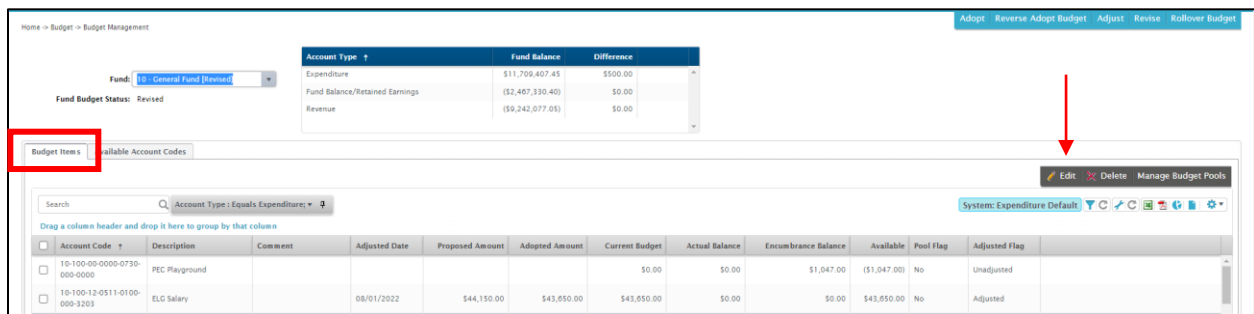

Figure 1: Edit Button under the Budget Items Tab

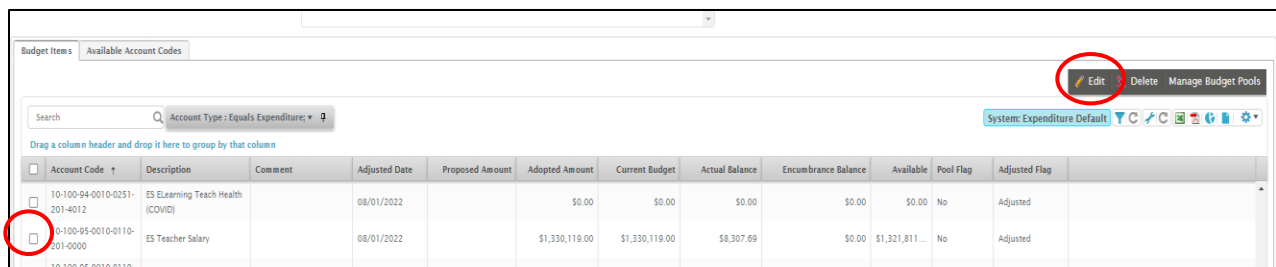Users can enter line items by checking the box next to the account code and then clicking **Edit**.

Figure 2: Select Account Code to be Edited

When the edit box pops up, line items can then be added to specify where the funds within the account code will be allocated. These line items can be edited or deleted once they are added. Changes must be saved to record the entries. If adding multiple budget item detail lines, using the "Save and Add" feature will allow for a more expedient way to add items. Note: A miscellaneous budget item can be added to the account code to increase the Proposed Amount to cover any unforeseen purchases that may need to be made from that account.

Once all budget item details have been added to the budget and the numbers have been verified; it can be adopted.
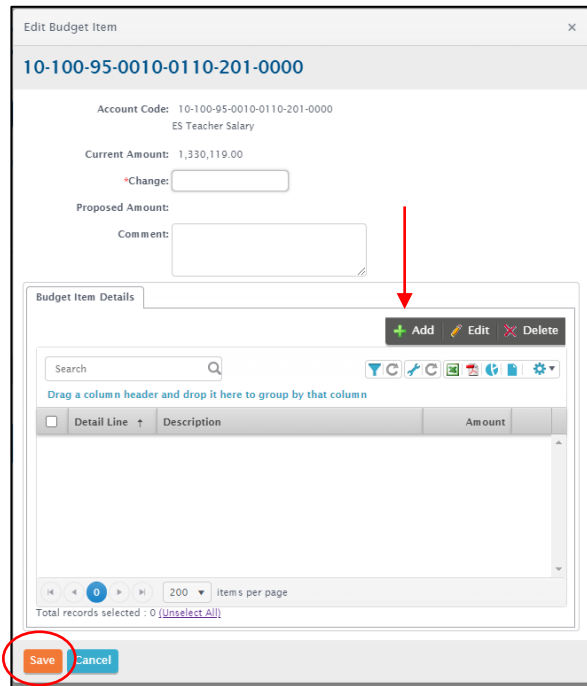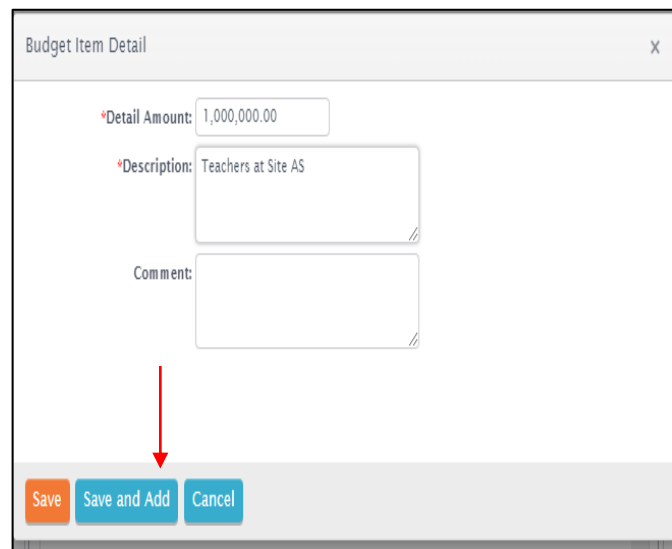

Figure 3: Add line Items by Clicking Add

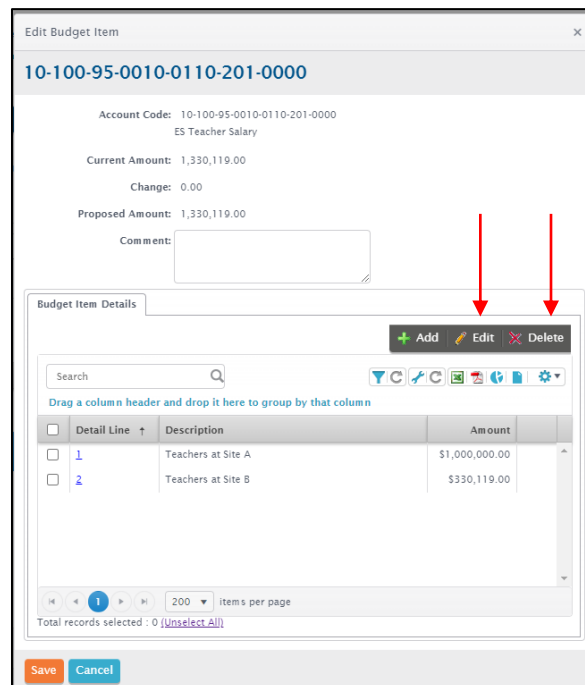*Figure 4: Use Save and Add for Adding Multiple Items*

Figure 5: Items can be Edited or Deleted

The **Edit** pop-up can also be used to increase or decrease budgeted account codes. When changes are recorded in this field, the amounts will be added to the Proposed Amount column in Budget Management for an adjustment or revision of the budget to be completed.
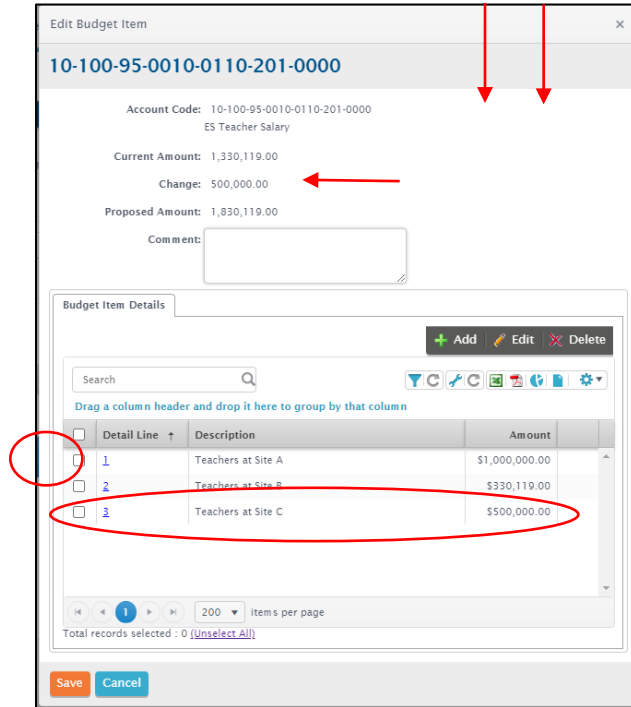

Figure 6: Budgeted Amounts can be Changed in this Screen

If the amounts of line items that were added increase or decrease your adopted budget, use the following commands based on circumstance.

Adjust: Budget amounts have been moved between accounts in the fund without changing the overall budget, and the changes have been posted to the general ledger.

Revise: The total budget amount has been changed; balancing transactions have been created; and the changes have been posted to the general ledger.
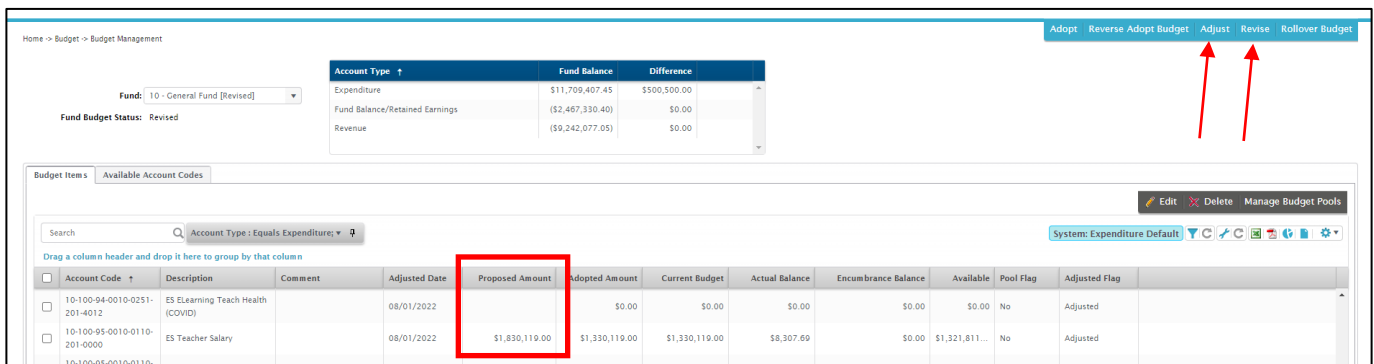

Figure 7: Amounts Changed Move to the Proposed Amount Column for your Budget to be Adopted, Adjusted or Revised