



**Activity:** **Pre-Budget Special Request**  
**Tyler Menu > Munis > Financials > Budget Processing > Next Year Budget Entry**

**Step 1-Select the Budget Projection**

1. For 2021, select Projection Number # **21380**-Pre-Budget Special Request from the drop down menu
2. Make sure the Budget Level field is "**2**" and click **Accept**
3. In the Cost Center field, input your cost center number and click **Accept**

**Step 2-Enter the Next Year Pre-Budget Capital Request**

1. Highlight the line of coding, distinguished by the object code to be used
  - a. Click **Detail Info** on the Munis ribbon
  - b. Click **Add**
  - c. Select **Operating/Capital** and click **OK**
  - d. At **Request Group** use the drop down menu to select the appropriate description of the request. The third page of this QSG shows the longer description of each option.
  - e. Tab to **User Defined** and select the appropriate **priority** for the request. It is **not** appropriate to select a funding source here, as all requests will be a request for district capital funding. Select one of these **three options**:
    - i. **101 - Priority 1**
    - ii. **102 - Priority 2**
    - iii. **103 - Priority 3**
  - f. Tab **once** to move to the **Quantity** field in the **Requested** section
    - i. Enter the quantity of items to be requested
    - ii. Tab to "Unit Cost" and enter the amount of each item
    - iii. Tab to "Description" and provide a detailed description of the items requested
    - iv. Tab to "Justification" to add any additional reasoning for the request
    - v. Click **Accept** to save the detail request
    - vi. Add TCM supporting documentation by clicking the Attach paper clip icon
2. Select **Account Detail Attachment**
  - a. Click **View Documents tab**
  - b. Click **New**
  - c. Click **Import** and select the location of the supporting document
  - d. Depending on the document type, you may be prompted to select, Launch in External Viewer
  - e. Click **Save**
    - i. If prompt appears saying to add a projection number, click **OK**
    - ii. In column on right side of screen enter **21380** in **Projection Number field**
    - iii. Click **Save**
  - f. Click **Close Viewer** to return to the detail entry screen
3. To add another request with the same coding, return to **step 1b**. Repeat until all special requests for the coding line have been entered
4. Click **Return** to navigate back to the Next Year Budget Entry. The total of all capital requests entered will now be visible.
5. To use a different line of coding for another request, repeat the steps above, beginning with **step 1a**.

**Step 3-Print Next Year Budget Reports**

Tyler Menu > Munis > Financials > Budget Processing > Next Year Budget Reports

1. Click Segment Find
2. Select projection number #**21380** Pre-Budget Special Request and click **Accept**
4. In Find by Segments, input your cost center number in the Cost Center field and click **Accept**
3. Click Report Options in the Munis ribbon, select fields as recommended by the screenshot below, and click **Accept**
4. Click on the PDF icon, print or use the save as command under file to save the document

Report			
Type	3 - NEXT YEAR BUDGET DETAIL REPORT		
<input type="checkbox"/>	Include employees with budget detail		
Budget level	2 - Schl/Dept		
Detail lines	Both		
Print first or second year of budget requests	<input checked="" type="radio"/> First <input type="radio"/> Second		

  

Sequences			Additional options	
Field #	Total	Page Break	99	Period number
1 1 - Fund	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Print revenue as credit
2 2 - Cost Center	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Include cfwd in rev bud
3 11 - Object	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Include cfwd in actuals
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Totals only
			<input type="checkbox"/>	Include segment code
			<input type="checkbox"/>	Include report grand totals by account type
			<input checked="" type="checkbox"/>	Print full GL account
			<input type="checkbox"/>	Double space
			<input checked="" type="checkbox"/>	Suppress zero bdgt accts
			<input type="checkbox"/>	Print as worksheet
			C	Print pct or comment
			<input type="checkbox"/>	Print text
			<input checked="" type="checkbox"/>	Amounts/totals exceed 999 million dollars
			<input type="checkbox"/>	Print five budget levels
			Multiyear view	Default view
			<input checked="" type="checkbox"/>	Print report options

### Request Group Codes

Code	Description	Short Description
100	Art-Fine Music Art Etc.	Art-Fine
110	Athletic Equipment	Athletics
120	Computers-Administrative Use	Comp Admin
130	Computers-Instructional	Comp Inst
140	Curriculum & Inst Equipment	Curr Equip
150	Custodial Equipment	Custodial
160	Equipment	Equipment
170	Furn Classroom Not Portable	Furn Class
180	Furniture District Office	Furn DO
190	Furn Media/Library Areas	Furn Media
200	Furn Portable Classrooms	Furn Port
210	Furn School Administrative Use	Furn Sc Ad
220	Geography Equipment	Geo Equip
230	Projectors & Installation	Projectors
240	Media Equipment	Media Eq
250	Media-Other (Books)	Media Oth
260	Maintenance Equipment	Maint Eq
270	Other	Other
280	Transp-golf cart small engine	Transpo
290	CCTE Equipment	CCTE Equip
300	Instrument Rotation	Instrument
310	ESE Equipment	ESE Equip

“Capital Requests” are to be entered via **Service Request**, not in the Next Year Budget Entry. To have a service request entered, refer to the [Facility Service Request](#) or [Telecom Service Request](#). Examples of Capital Requests are below:

Storage Building
Athletic Renovations
ADA
Technology
Flooring Renovation
Carpeting
Grounds
Painting
Fencing
Playground Structures
Security
Agricultural Buildings
Career Academies
Sidewalks
Play Courts
Paving
Bus Loop & Parking
Outdoor Lighting
Irrigation/Sprinklers
Covered Walkways
Outside Covered Areas