MUNIS QSG

QUICK START GUIDE

Activity: **Next Year Budget Entry - Schools**
Tyler Menu > Munis > Financials > Budget Processing > Next Year Budget Entry

Step 1 - Select the Budget Projection
1. For 2019 enter Projection Number **# 19100**, click the green **'Accept'** icon
2. On the **Account Find Criteria** panel, in **Segment Name** field, **tab** and enter Cost Center and Project 01000 or other project associated with the cost center
3. Click **Accept**

Step 2 - Enter 2019 Budget Requests
1. Click **Update** and enter amounts for each coding line in the '2019 Schl/Dept' amount column
2. Click **Accept**
3. Travel lines and lines with increases or decreases in budget will require detail entry
    a. Click **Detail Info** in the ribbon
    b. Select **Add**
    c. A **Detail Add** window appears, type of detail defaults to **Operating/Capital**
    d. Click **OK**
    e. Tab to **Quantity** and input the amount (e.g. 3 for 3 administrators)
        i. Tab to **Unit Cost** and enter the amount for each unit (e.g. $1,500 for each administrator)
    f. Enter information in the **Description field**, type a detailed explanation about the travel/budget increase or decrease/budget rationale, assumptions, rates, etc. (e.g.the Principal/Administrators names, etc.)
    g. Click **Accept**
        i. Click **Return** to navigate back to the Next Year Budget Entry
    h. Click **Update** to continue entering amounts in the 2019 Schl/Dept Amount column until all lines needed for 2019 have been entered
    i. Click **Accept**
4. To enter another project, select search and it will bring you back to Account Find Criteria
    a. Repeat the sequence of steps for each separate project

Step 3 - Print Tentative Budget by Project (shows expenditure trends over past 3 years)
Tyler Menu > Munis > Financials > Budget Processing >Tentative Budget by Project
1. Sign in using your Munis credentials
2. From the drop down menus select:
    a. Fund-**1100** Gen Oper
    b. Cost Center – **Cost Center Number**
    c. Project – Projects for which Cost Center is responsible **(DO NOT SELECT ALL)**
    d. Projection – **19100**
    e. Suppress Zero Activity? **Yes**
    f. Budget **Level – Level 2**
    g. Objects **– All**
    h. Account Type **– Expense**
    i. Heading Base Year **- 2018**
3. Click **View Report**

4. Print Report
    a. Select the **Export** icon drop down and select PDF (the arrow below indicates the icon location). **Do not select print.**
    b. Munis system messages 'Do you want to open or save Tentative Budget by Project.pdf from olap.pasco.k12.fl.us?' **Click Open**
    c. PDF report opens, use the printer icon on the PDF to print the report

Fund:	1100 - Gen Oper	Center:	0031 - Pasco High
Project:	01000 - Basic Discretionary	Projection:	19100
Suppress Zero Activity?	Yes	Budget Level:	Level 2
Object:	100000 - Cash-Mst, 100001 - AP Dis	Account Type:	Expense
Heading Base Year	2018		

|◄ ◄ 1 of 2 ? ► ►| Find | Next   💾▾ 🔄 📙

Tentative Budget by Project
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Full Account	Object Description	2016 Actuals	2017 Actuals	2018 Actuals	2018 Encumbrances	2018 Revised Budget	2018 Original Budget	2019 Projected Budget
PROJECTION: 19100 - Schools Level 2				CC : 0031 - Pasco High				
01000 - Basic Discretionary								
1100.0031.13.01000.536000.5100.0000	Rentals	0.00	0.00	60.00	0.00	60.00	0.00	
1100.0031.13.01000.539001.7300.0000	Printing	200.00	4,288.50	55.00	0.00	3,500.00	3,500.00	
1100.0031.13.01000.551000.5100.2113	Supplies	0.00	0.00	0.00	0.00	100.00	100.00	
1100.0031.13.01000.551000.5100.2140	Supplies	0.00	0.00	0.00	0.00	100.00	100.00	
1100.0031.13.01000.551000.5100.2110	Supplies	0.00	0.00	0.00	0.00	280.00	280.00	
1100.0031.13.01000.551000.5100.0019	Supplies	0.00	0.00	0.00	0.00	400.00	400.00	
1100.0031.13.01000.551000.5100.0059	Supplies	0.00	0.00	192.30	0.00	200.00	200.00	

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