Activity: **Pre-Budget Capital Request**

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

Step 1-Select the Budget Projection

1. For 2019, select Projection Number # **20380**-Pre-Budget Capital 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 2019 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 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 **20380** 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 #**20380** Post-Budget Capital 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

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Report

Type	3 - NEXT YEAR BUDGET DETAIL REPORT ▼

☐ Include employees with budget detail

Budget level	2 - Schl/Dept ▼
Detail lines	Both ▼

Print first or second year of budget requests
◉ First
○ Second

Sequences

Field #		Total	Page Break
1	1 - Fund ▼	☐	☐
2	2 - Cost Center ▼	✓	✓
3	11 - Object ▼	✓	☐
4	▼	☐	☐

Additional options

99	**Period number**

✓ Print revenue as credit
☐ Include cfwd in rev bud
☐ Include cfwd in actuals
☐ Totals only
☐ Include segment code
☐ Include report grand totals by account type
✓ Print full GL account
☐ Double space
✓ Suppress zero bdgt accts
☐ Print as worksheet
C ▼   Print pct or comment
☐ Print text
✓ Amounts/totals exceed 999 million dollars
☐ Print five budget levels

Multiyear view	Default view ▼

✓ 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
600	Storage Building	Store Bldg
610	Athletic Renovations	Athl Renov
620	ADA	ADA
630	Technology	Technology
640	Flooring Renovation	Flooring
650	Carpeting	Carpeting
660	Grounds	Grounds
670	Painting	Painting
680	Fencing	Fencing
690	Playground Structures	Playground
700	Security	Security
710	Agricultural Buildings	Agricultur
720	Career Academies	Career Acd
730	Sidewalks	Sidewalks
740	Play Courts	Play Court
750	Paving	Paving
760	Bus Loop & Parking	Bus/Park
770	Outdoor Lighting	Out Light
780	Irrigation/Sprinklers	Irrigation
790	Covered Walkways	Cvrd Walk
800	Outside Covered Areas	Cvrd Area