

# Next Year Budget Entry

**Please follow these directions for each level of access. Substitute “Level 1” for your level of access within the directions.**

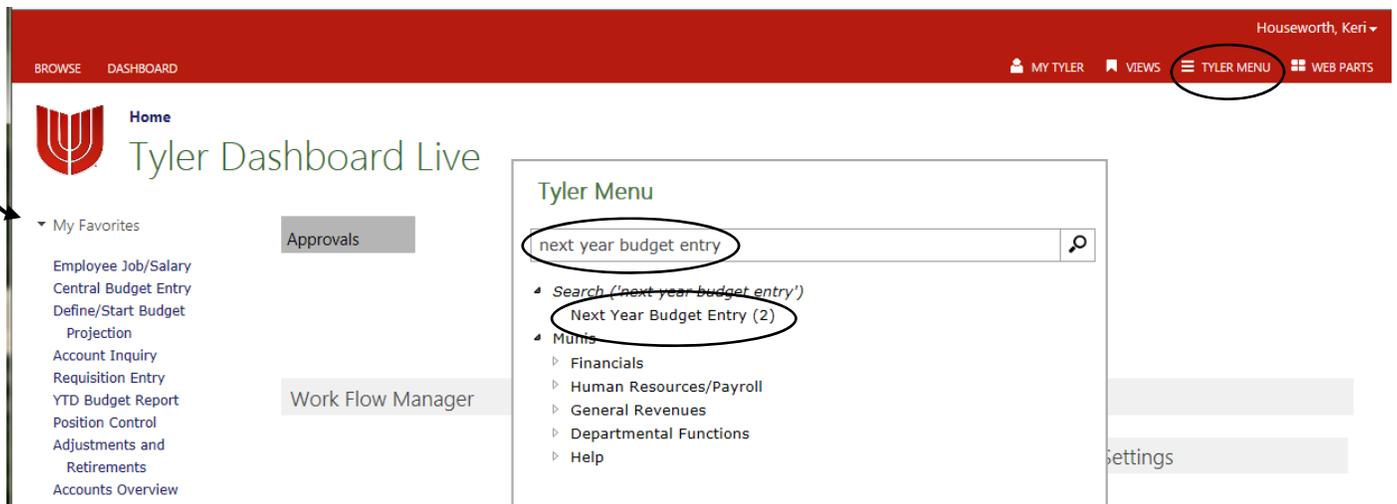
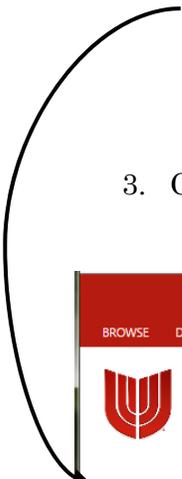
**Access levels are date sensitive.**

**If you are not able to access NYBE, please confirm your access dates. These dates can be found within the Budget Preparation Instructions on the Union website.**

Log into Munis:

<https://munis.unionps.org:55000/default.aspx>

1. Click on **TYLER MENU** option located in the red ribbon (right side of screen).
2. In the search box, type “**next year budget entry**” and press Enter.
  - a. Right click on Next Year Budget Entry (2) or Next Year Budget Entry and click **ADD TO MY FAVORITES**. Next time you access Munis, Next Year Budget Entry will appear under “My Favorites” on the left side of your screen. (You can create this short cut for all Munis applications.)
3. Click on **Next Year Budget Entry (2)** or **Next Year Budget Entry** to access the application.



Everyone will be accessing the same FY2020 non-salary projection (20003).  
 We have set up restrictions in Munis so you will only be able to view your piece of the pie! ☺  
 If you are not able to access a specific project, please contact the budget department for assistance.

The budget department will be running a separate projection that will calculate FY20 regular salary accounts as well as provisional salary accounts.

Please verify/change the following items so they mirror the below screen shot:

**Projection number = 20003** (you may not be able to access this field)

**Budget level = 1** (you may not be able to access this field)

**Calculation Method = 1 - Current Budget** (you may not be able to access this field)

Continue tabbing through until your cursor lands on the **Fund** search value, then **STOP** ☺

The screenshot shows a software interface with a top navigation bar containing icons for Accept, Cancel, Search, Query Builder, Add, Update, Delete, Global, Duplicate, Print, Text file, PDF, Preview, Excel, Word, Email, Schedule, Attach, Notes, Audit, Maplink, Alerts, and Return. The 'Define Projection' section includes fields for Projection number (20003), Budget level (1), and Calculation Method (1 - Current Budget). Below this is the 'Account Find Criteria' section, which is a table with the following rows:

Segment Name	Search Value
Fund	
DIVISION	
PROJECT	
FUNCTION	
Object	
PROGRAM	
SUBJECT	
JOB CLASS	
SITE CODE	
Account Type	
Account Status	
Rollup Code	
Character Code	

Please enter the **Fund** and **Project** that you would like to review/edit.

If you are reviewing/editing multiple projects, you will need to repeat this step for each project.

Type **5\*** for the function. (This will pull in all functions that are expense, not revenue.)

Click **Accept** on the ribbon (to save your selection).

The screenshot shows a software interface with a ribbon at the top and two main sections below. The ribbon includes icons for Confirm (Accept/Cancel), Search (Query Builder), Actions (Add/Update/Delete/Global/Duplicate), Output (Print/Text file/PDF/Preview), and Office (Excel/Word/Email/Schedule/Attach). The 'Define Projection' section has a 'Projection number' field with '20003' and a dropdown showing 'NON SALARY BUDGET PROJECTION 2020'. Below it, 'Budget level' is set to '1' and 'Calculation Method' is '1 - Current Budget'. There are checkboxes for 'Hide Budget Detail' and 'Filter By Amount'. The 'Account Find Criteria' section is a table with columns for 'Segment Name' and 'Search Value'. The 'FUNCTION' row is highlighted, and its 'Search Value' field contains '5\*' and is circled in yellow. Other rows include Fund, DIVISION, PROJECT, Object, PROGRAM, SUBJECT, JOB CLASS, SITE CODE, Account Type, Account Status, Rollup Code, and Character Code, all with empty search value fields.

Segment Name	Search Value
Fund	
DIVISION	
PROJECT	
FUNCTION	5*
Object	
PROGRAM	
SUBJECT	
JOB CLASS	
SITE CODE	
Account Type	
Account Status	
Rollup Code	
Character Code	

Reminder – you are accessing data from a very large projection. It might take Munis a minute to pull up your data. Whenever Munis is “thinking”, little grey boxes will appear in the top right corner of the screen. ☺

Here is an example of the screen you should be viewing.

Your budget amounts will not match the screen shot below.

This is an example from the test environment so some of the verbiage may vary.

You may see other columns on this screen to the right of 2020 LEVEL 1 Amount. If other columns appear and you wish to eliminate them, right click on the grey column title bar and uncheck the columns within the dropdown menu. (Munis is a little finicky so you may have to right click and wait a second before seeing the dropdown menu.)

Removing columns is not required.

**This screen has two sections:**

- The “Current Projection” section keeps a running total of your project at your level of access.
- The “Account” section is where you will review/edit each line of your budget.

Next Year Budget Entry - Munis (TEST DATABASE Jan 30 2018)

Current Projection 20003 TEST NON SALARY PROJECTION Access level: LEVEL 1

LEVEL 1 Total  
17,198.00

Account

Segment threshold PROJECT remaining threshold 763.00

Text	T	Full Account	Description	2020 LEVEL 1 Amount
Y	E	11. .51000.0430.000.0000.000.000	INSTRCTN-REPAIR/MAINT	2,000.00
N	E	11. .51000.0580.000.0000.000.000	INSTRCTN-STAFF TRAVEL	299.00
N	E	11. .51000.0611.000.0000.000.000	INSTRCTN-PAPER/COPY SU	2,500.00
N	E	11. .51000.0619.000.0000.000.000	INSTRCTN-GEN OTH SUPP	2,500.00
N	E	11. .51000.0641.000.0000.000.000	INSTRCTN-BOOKS	100.00
N	E	11. .51000.0653.000.0000.000.000	INSTR-SFTWR & RLTD ITEMS	700.00
N	E	11. .51000.0654.000.0000.000.000	INSTRCTN-FURN/FIXTURE	200.00
N	E	11. .51000.0658.000.0000.000.000	ADAP SUPPLIES	399.00
N	E	11. .51000.0681.000.0000.000.000	INSTR-CO&EXTRA-CURR SUP	1,500.00
N	E	11. .51000.0430.100.0000.000.000	INSTRCTN-REPAIR/MAINT	200.00
N	E	11. .51000.0550.100.0000.000.000	PRINTING BINDING	900.00
N	E	11. .51000.0619.100.0000.000.000	INSTRCTN-GEN OTH SUPP	.00
N	E	11. .52120.0619.000.0000.000.000	GUIDANCE SVC-GEN OTH SUPP	200.00
N	E	11. .52132.0616.000.0000.000.000	MED SVCS-FIRST AID SUPPLS	900.00
N	E	11. .52199.0683.000.0000.000.000	EXTRACURRICULAR SUPPLIES	450.00

Budget Detail for Account: 11. .51000.0430.000.0000.000.000 INSTRCTN-REPAIR/MAINT

Year	Ln	Seq	Period	Proj Qty	LEVEL 1 Qty	LEVEL 1 Unit Cost	LEVEL 1 Amount	LEVEL 2 Qty	LEVEL 2 Unit Cost	LI
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**Some fun facts:**

- Level 1 contains your budget as it was set up in FY20
- If your budget was adjusted due to a change in student count, you can find the increase or decrease on the following line of OCAS 11.xxxx.xxxx.51000.0619.000.0000.000.000
- Upper levels (if visible) will be unlocked at a future date for supervisor approval.
- You can view all accounts in your budget by placing your mouse over the account lines and scrolling down.

## Changing budget amounts:

Click **Update** on ribbon.

You are now able to update your budget via column “2020 LEVEL 1 Amount”.

Please review each line of your budget. (Remember to scroll down to see additional OCAS lines.)

- You can manually type in new budget amounts in “2020 LEVEL 1 Amount” column.
- When making budget amount changes, please enter all reductions first. Munis will not allow your total budget to go over the project limit.
- It is recommended that you correct all budget amounts with existing OCAS first.
- You will have the opportunity (see next page) to add additional lines of OCAS if needed.

Once all current OCAS line amounts are correct, click **Accept** on ribbon (to save your current changes).

You are able to click Accept at any time but you will have to click Update to continue editing budget account lines.

**Notice:** As you make changes to budget amounts, you will see the sum total of your budget reflected in the **Current Projection** section under LEVEL 1 Total.

- You will NOT be able to save your changes if the Total budget exceeds your limit. If you have exceeded your budget, now is the time to correct the line(s) of OCAS to meet the budget threshold.

Next Year Budget Entry - Munis [TEST DATABASE Jan 30 2018]

HOME

Accept Cancel Search Browse Query Builder Add Update Global- Delete Duplicate Print Text file PDF Excel Word Email Schedule Office

Confirm Search Actions Output

Current Projection: 20003 TEST NON SALARY PROJECTION Access level: LEVEL 1

LEVEL 1 Total  
17,198.00

Account

Segment threshold PROJECT remaining threshold 763.00

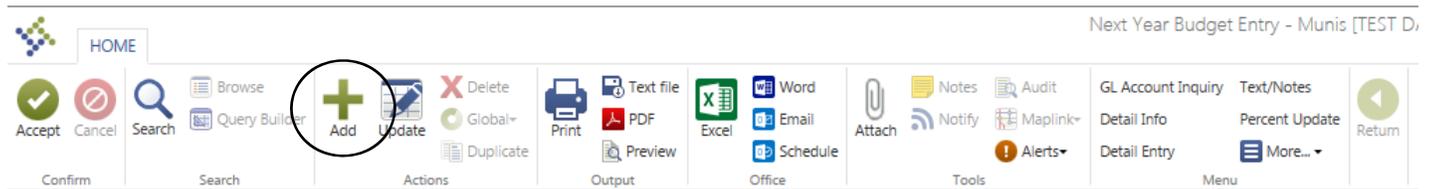
Text	T	Full Account	Description	2020 LEVEL 1 Amount
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N	E	11. .51000.0580.000.0000.000.000	INSTRCTN-STAFF TRAVEL	299.00
N	E	11. .51000.0611.000.0000.000.000	INSTRCTN-PAPER/COPY SU	2,500.00
N	E	11. .51000.0619.000.0000.000.000	INSTRCTN-GEN OTH SUPP	2,500.00
N	E	11. .51000.0641.000.0000.000.000	INSTRCTN-BOOKS	100.00
N	E	11. .51000.0653.000.0000.000.000	INSTR-SFTWR & RLTD ITEMS	700.00
N	E	11. .51000.0654.000.0000.000.000	INSTRCTN-FURN/FIXTURE	200.00
N	E	11. .51000.0658.000.0000.000.000	ADAP SUPPLIES	399.00
N	E	11. .51000.0681.000.0000.000.000	INSTR-CO&EXTRA-CURR SUP	1,500.00
N	E	11. .51000.0430.100.0000.000.000	INSTRCTN-REPAIR/MAINT	200.00
N	E	11. .51000.0550.100.0000.000.000	PRINTING BINDING	900.00
N	E	11. .51000.0619.100.0000.000.000	INSTRCTN-GEN OTH SUPP	.00
N	E	11. .52120.0619.000.0000.000.000	GUIDANCE SVC-GEN OTH SUPP	200.00
N	E	11. .52132.0616.000.0000.000.000	MED SVCS-FIRST AID SUPPLS	900.00
N	E	11. .52199.0683.000.0000.000.000	EXTRACURRICULAR SUPPLIES	450.00

Budget Detail for Account: 11. .51000.0430.000.0000.000.000 INSTRCTN-REPAIR/MAINT

Year	Ln	Seq	Period	Proj Qty	LEVEL 1 Qty	LEVEL 1 Unit Cost	LEVEL 1 Amount	LEVEL 2 Qty	LEVEL 2 Unit Cost	LI
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## Adding new OCAS budget lines:

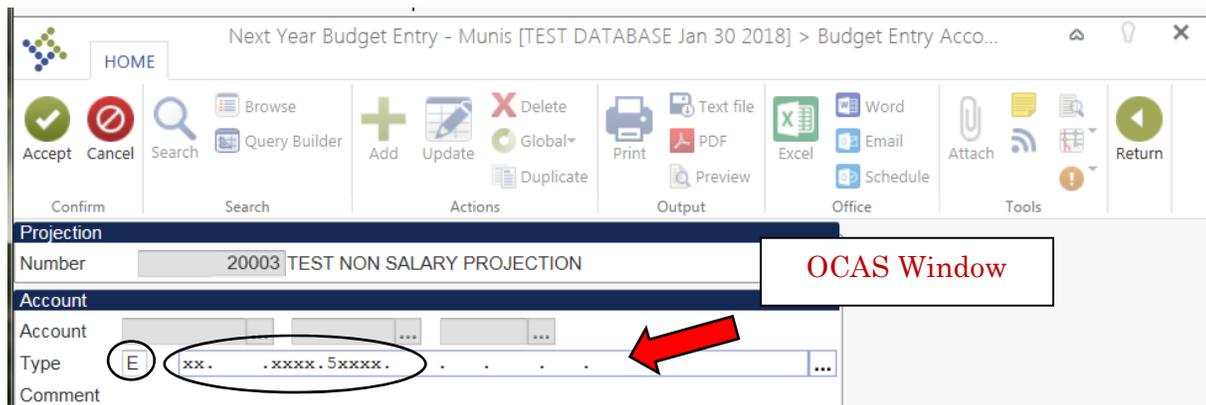
Click **Add** on ribbon.



Type “E” for expense account (see circle below).

OCAS Window:

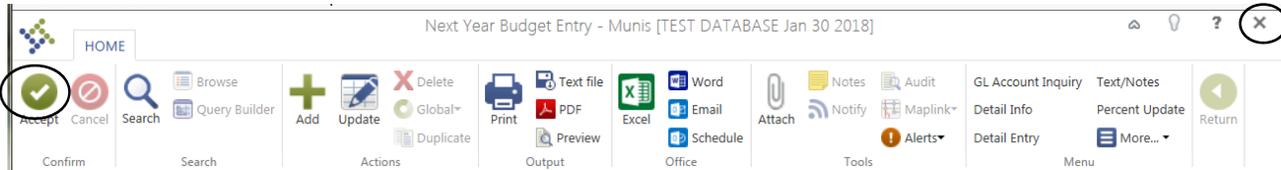
- Type in a portion of the OCAS for your new line of budget using your keyboard arrows to move around in this OCAS Window (suggestion: type in the Fund, Project and Function)
- Then click the at the end of the window
- You will receive a list of linked budget accounts that fall within your selection. (Please make every effort to choose an account that has zeros after the object.)
- Click on the OCAS line and then click **Accept** in the ribbon.
- Your selected OCAS will appear in the OCAS Window.
  - If this is the correct OCAS, click **Accept** again. You will notice the following message at the bottom of the screen “Account successfully added to projection.” Click **Return** to go back to the main screen and view your new OCAS line with 0.00 budget.
  - If you chose the wrong account, click **Cancel** and click **Add** to repeat this step.



On the main screen, click **Update** on ribbon and proceed with adding budget to the new budget line.

Continue decreasing and increasing the lines of your budget until your budget reflects your desired spending for FY20. Don't forget to verify your “**remaining threshold**” amount is **0.00** 😊.

When you are finished, click **Accept** on ribbon (to save your work) and then click the grey “x” to close the window.



You are finished entering your budget. 😊

You may re-visit NYBE and make changes until your access is disabled via your date range.