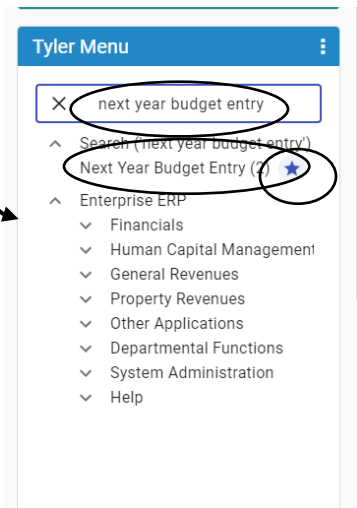


Next Year Budget Entry

Log into Munis

If you have never been to Next Year Budget Entry:

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. Click on the star next to Next Year Budget Entry (2) or Next Year Budget Entry and TO 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** to access the application.



Everyone will be accessing the same FY2024 non-salary projection (24005).

There are restrictions in Munis so you will only be able to view YOUR Non-salary budget.

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 FY24 regular salary accounts as well as provisional salary accounts.

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 expense accounts that you have access to)

Account Find

Next Year Budget Entry [Union Public Schools] > Account Find >

Define Projection

Projection number: 24005 FY24 Non-Salary Budget Projection

Budget level *: 1 - LEVEL 1 Calculation Method: 1 - Current Budget

Hide Budget Detail

Filter By Amount

Account Find Criteria

| Segment Name | Search Value |
|-----------------|--------------|
| Fund | [Redacted] |
| DIVISION | [Redacted] |
| PROJECT | [Redacted] |
| FUNCTION | [Redacted] |
| Object | [Redacted] |
| PROGRAM | [Redacted] |
| SUBJECT | [Redacted] |
| JOB CLASS | [Redacted] |
| SITE CODE | [Redacted] |
| Account Type | [Redacted] |
| Account Status | [Redacted] |
| Rollup Code | [Redacted] |
| Sub-Rollup Code | [Redacted] |
| Character Code | [Redacted] |

Click **Accept** on the ribbon

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.

You may see other columns on this screen to the right of 2024 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.

The screenshot shows the 'Next Year Budget Entry' screen for 'Union Public Schools'. It displays a 'Current Projection' for '24005 FY24 Non-Salary Budget Projection' at 'LEVEL 1' access. A table shows levels 1 through 4 with a total of 19,251.00. Below this is the 'Account' section with a 'Segment threshold' of -5,890.00. A detailed table lists various account lines (e.g., INSTRCTN-CERT SUBS) with columns for '2024 LEVEL 1 Amount' and '2024 LEVEL 2 Amount'. Red callout boxes with arrows point to the total amount (19,251.00), the segment threshold (-5,890.00), and the '2024 LEVEL 1 Amount' column.

- Level 1 contains your budget as it was set up in 2022-2023
- If your budget was adjusted due to a change in student count, you will need to adjust your budget to equal your new total budget amount by adding or deducting from a line of OCAS.
- 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 “2024 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 “2024 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 can click Accept at any time, but you will have to click Update to continue editing budget account lines.


Notice: 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

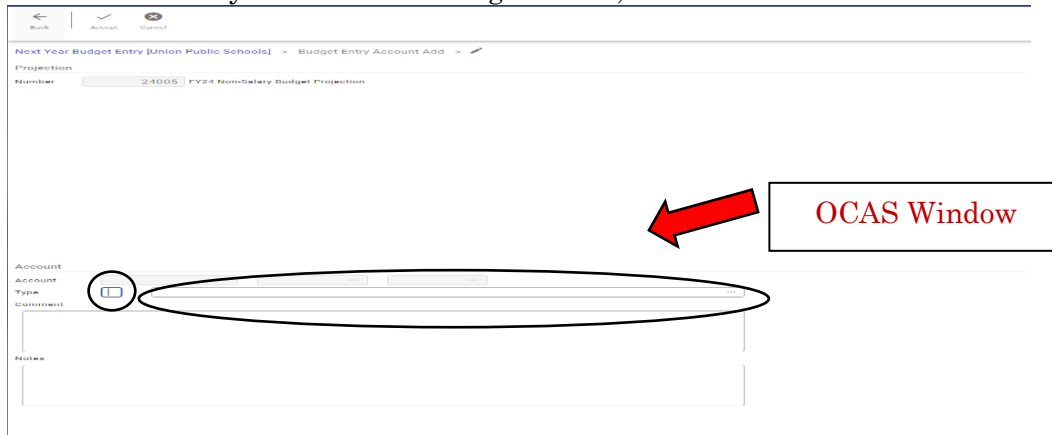
Adding new OCAS budget lines:

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)

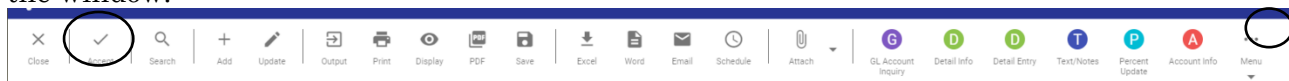
- Then click the  at the end of the window
- You will receive a list of linked budget accounts that fall within your selection. (Please make every effort to choose an account that has zeros after the object.)
- Click on the OCAS line and then click **Accept** in the ribbon.
- Your selected OCAS will 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 FY23. 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 dates have passed.

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

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.**