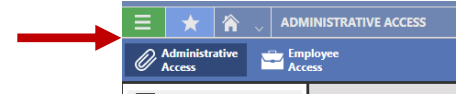





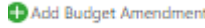
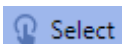
## Elgin Independent School District – Purchasing User Guide

### Budget Amendment

**Note:** User must be in Administrative Access to complete the steps below.






#### I. Enter a Budget Amendment

1. Click the menu icon  and select Budgeting > Budget Amendment.
2. Click Add Budget Amendment  located on the far right of the screen.
3. Enter the required information:
  - **Budget Amendment Group** – Click dropdown arrow, click the finger to  Select appropriate option
  - **Fiscal Year** – verify the correct year
  - **Batch** – enter the 3 **initials** of the person entering PO and the **date (ABC mm/dd/yyyy)**
  - **Budget Amendment Description** – enter a basic description of the amendment\*  
\*Copy Description to paste on next screen
4. Click **Save & Add Detail** - button located at the top left of the screen.  
The **Budget Amendment Detail** screen displays.




5. Enter the required information:
  - **Account** – Start typing account number (Shortcut: in place of “E” type a 5) Select an option.
  - **Description** – Paste description from previous screen or enter new description.
  - **Amount In-** (increases budget) Enter whole dollar amount (no \$, no cents)
  - **Amount Out** – (decreases budget) Enter whole dollar amount (no \$, no cents)
6. Click **Save & Add Another (must have two details)**
7. **Repeat step 5** to add another amendment detail.
8. Click **Save\*\*** or **Save and Submit**.

9. Add attachment (optional) –
  - a. From the **Budget Amendment List** screen, locate the Amendment and click the  paperclip.
  - b. Click **Add Attachment** 
  - c. Click **Select Files** to attach the file.
  - d. **Attachment Type** – select **Default**
  - e. **Comment** – enter comment
  - f. Click **Save**.
  - g. Close the attachment window.

\*\*If you chose **Save** and did not submit, you may submit from the Budget Amendment List screen: click the dropdown arrow to  view the options. Select **Submit**.

## II. View Approvals –

- a. Click the menu icon  and select Budgeting > **My Budget Amendment Approvals**
- b. Click the arrow  to view Budget Amendment Details, Account Summary, or Approvals.
- c. Select **Approvals** to see “Waiting for Approval” and “Approval History”.