

OPERATING BUDGET USER MANUAL



BUDGET OFFICE

**CARROLL COUNTY PUBLIC SCHOOLS
OPERATING BUDGET USER MANUAL**

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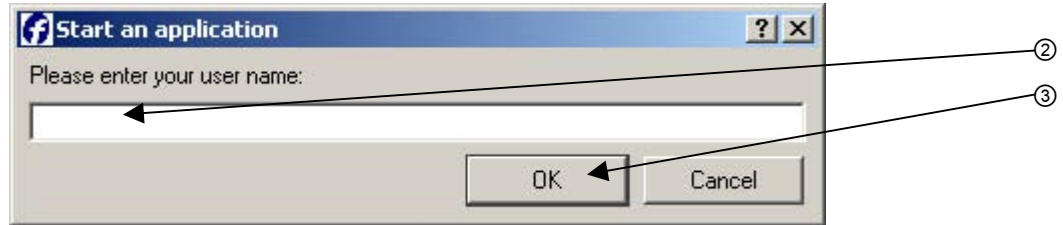
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SIGN ON PROCEDURES

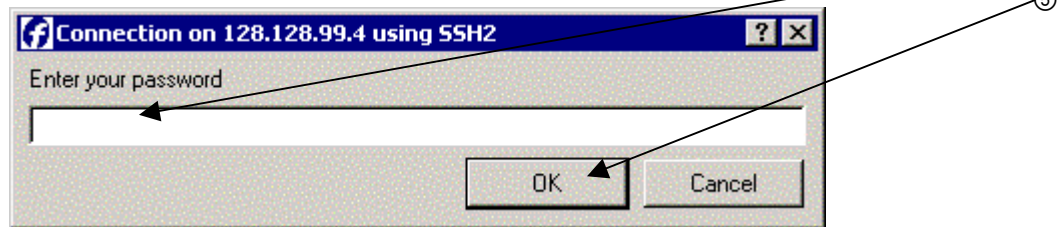
1) **Double Click** on the **FinancePlus LIVE DB** icon.

2) Enter your **“Username”**.



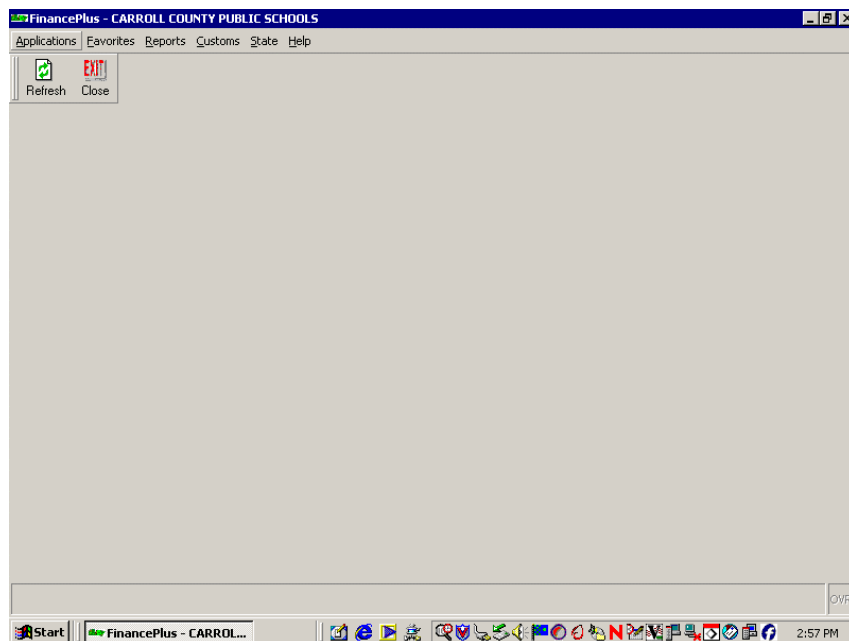
3) Click **“OK”**

4) Enter your **“Password”**.



5) Click **“OK”**

If entries are typed properly, the **FinancePlus** session should open.

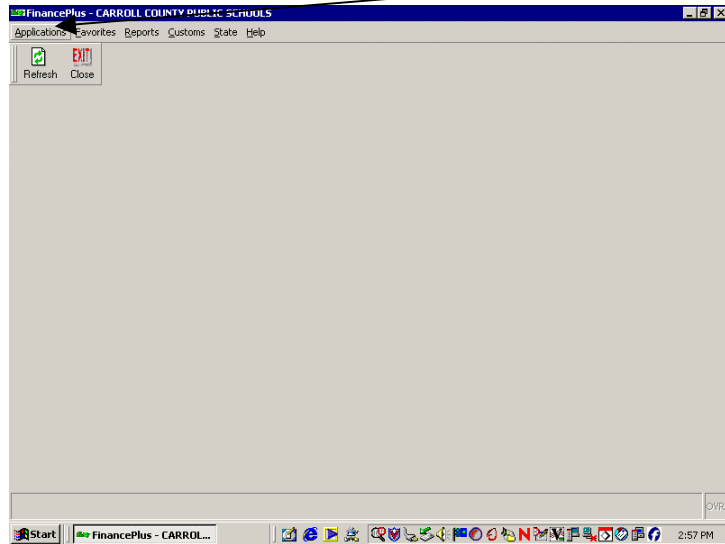


Note: If you do not have access to the **FinancePlus** or have problems logging in, please contact the information technology help desk.

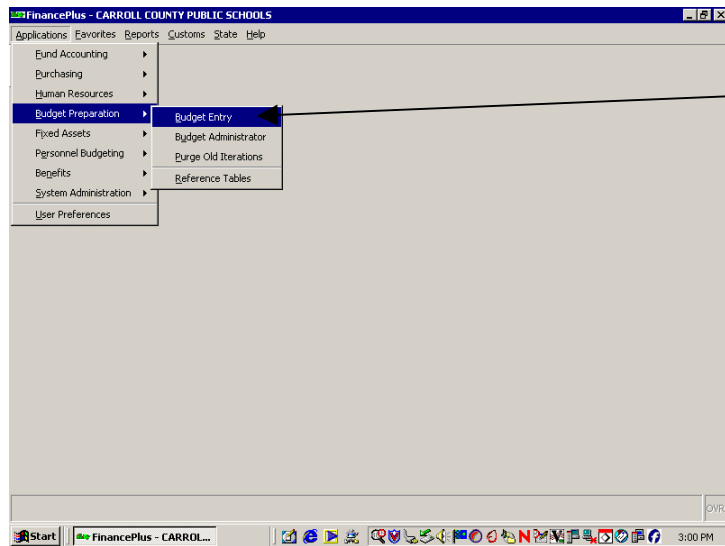
ANNUAL BUDGET PREPARATION

SETTING BUDGETS – BUDGET ENTRY

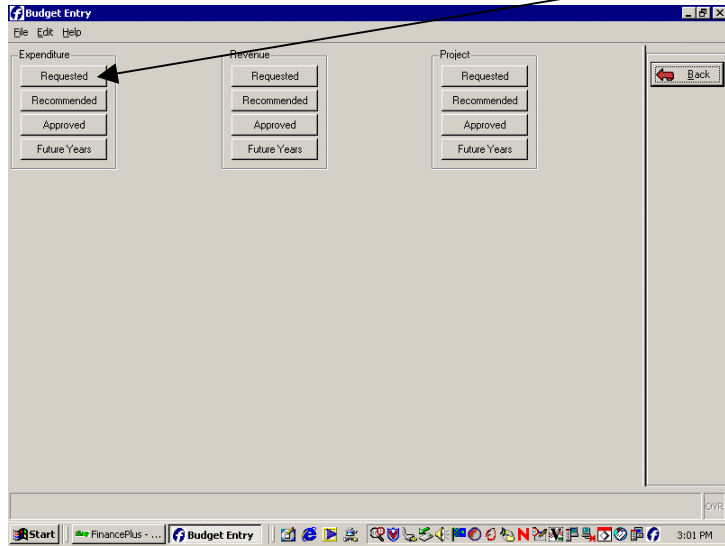
1) Click “Applications”



2) Select “Budget Preparation”
and Click “Budget Entry”



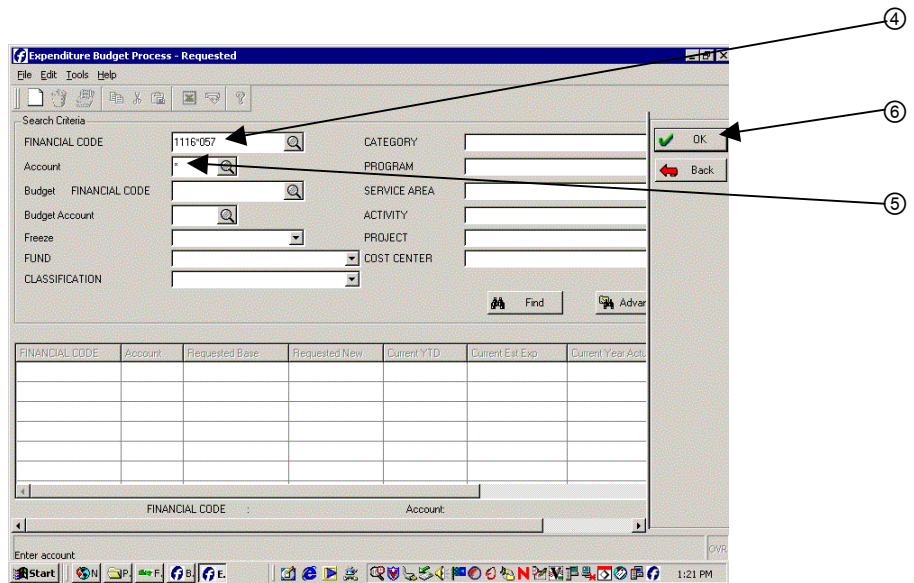
3) Under “Expenditure”,
Click “Requested”



4) Type the first four (4) digits of the “Financial Code”, an asterisk (*) and the three-digit Cost Center number, e.g. 1116*057, and press “Tab”

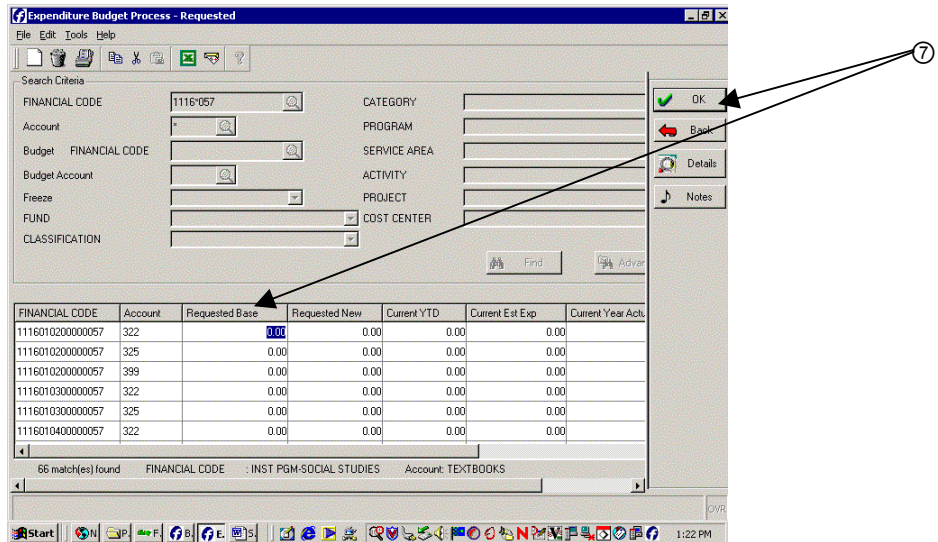
5) Type an asterisk (*) for all accounts at “Account”

Note: To enter the budget for a single “line item”, type the complete 16 digit “Financial Code” and 3 digit “Account”




6) Click “OK”

7) In the **“REQUESTED BASE”** field, type in an amount and Click **“OK”**
Please keep amounts in whole dollars.



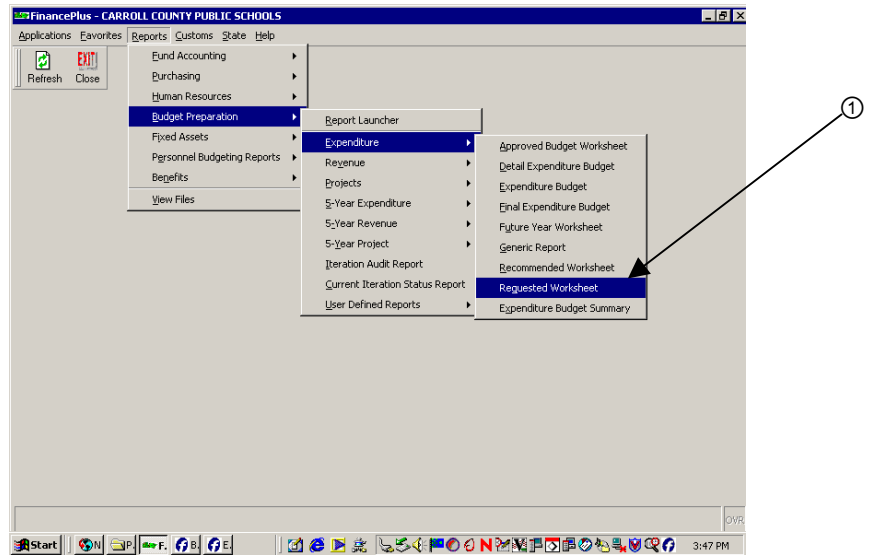
Please note the following:

- Budgets must be entered in **“REQUESTED BASE”** field
- You must Click **“OK”** to save the budgets you have entered
- Totals at the bottom of the screen are updated after you Click **“OK”**
- To export table to Excel, Click on  icon at the top of the screen (some reformatting may be necessary)

PRINTING REPORTS – BUDGET REQUESTS

To print budgets requests from the Budget Preparation module:

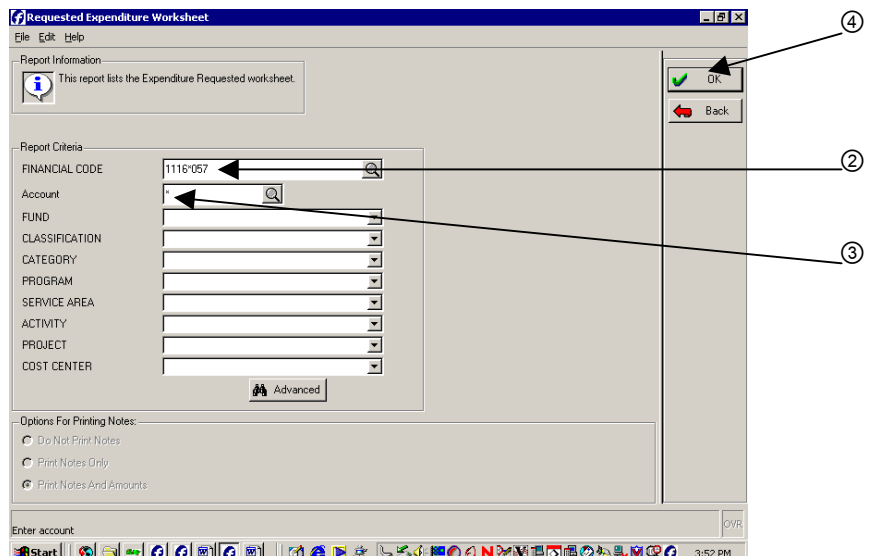
1) Click on **Reports**, select **Budget Preparation**, select **Expenditure**, and click **Requested Worksheet**.



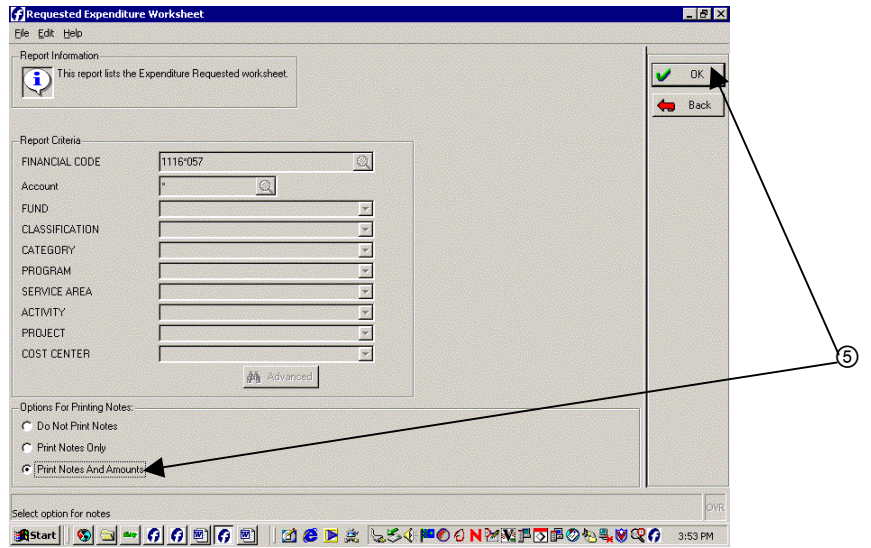
2) Enter the first four (4) digits of the **FINANCIAL CODE**, an asterisk (*) and the three-digit cost center number.

3) Type an asterisk (*) for all accounts at **ACCOUNT**.

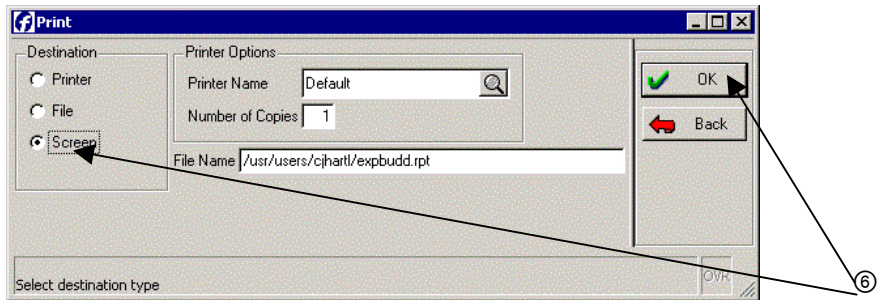
4) Click **“OK”**.



5) Select “Print Notes and Amounts” and Click “OK”



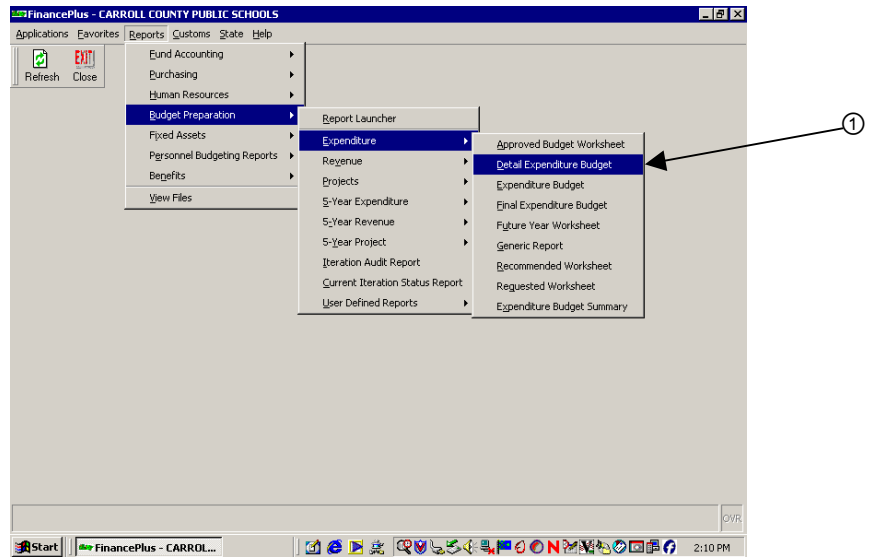
6) Select “Screen” and Click “OK”



PRINTING REPORTS – APPROVED BUDGETS

To print approved budgets from the Budget Preparation module:

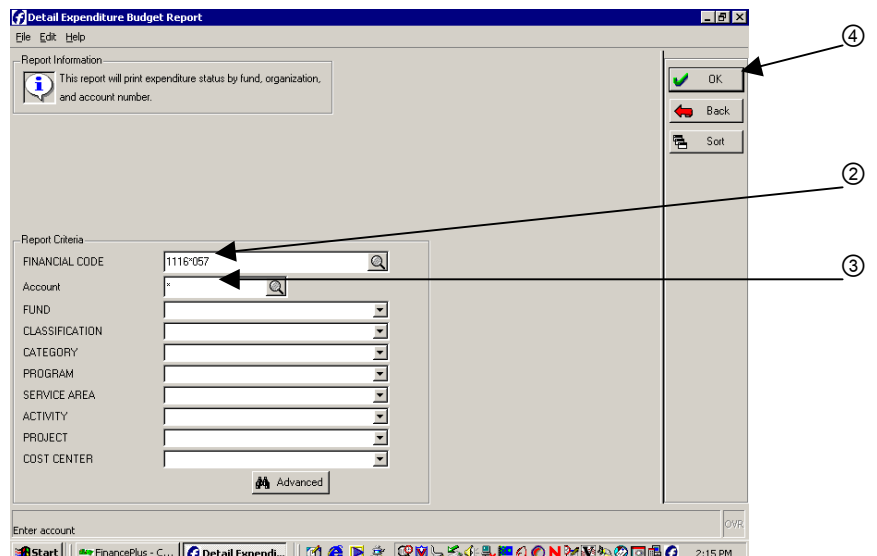
1) Click on **Reports**, select **Budget Preparation**, select **Expenditure**, and click **Detailed Expenditure Budget**.



2) Enter the first four (4) digits of the **FINANCIAL CODE**, an asterisk (*) and the three-digit cost center number.

3) Type an asterisk (*) for all accounts at **ACCOUNT**.

4) Click **“OK”**.



5) Select “screen” in the **DESTINATION**.

6) Click “**OK**”.

