

## Added Budget Category to Chart of Accounts

AFD-447

## Introduction

A new field called **Budget Category** has been added to all regions in the Chart of Accounts. Budget Categories allow users to create categories and assign them to account codes for customized reporting. Currently, the Comparative Financial Statement Report can be sub-totaled by Budget Categories.

To add Budget Categories, go to Administration > System Configuration and search on the word Budget. A screen like the one below will be displayed. Click on Budget Categories and a pop-up box will appear where you can enter the values/names of the Budget Categories. Each value should be entered on it's own line. A Description can also be entered on this screen.

NE	RAL CUSTOM NUMBERS					
bu	dget Q			Edit Configur	ation Value	×
Drag	a column header and drop it here to grou	by that column		Setting:	Budget Categories	
	Setting †	Value	Description			_
	Audit Level - Budget Management	Manager	The Budget Management security access level whose operations will to operations for that access level and above will be logged.	Value:		
	Budget Categories		The list of valid Budget Categories available to the COA screen.			
	Budget Requisition Entry Period	No	Disables Budget Requisition functionality when outside of the annual t "Yes" when the entry of Budget Requisistions is allowed, "No" when it is		Enter each value in a new line	
					The list of valid Budget Categories available to	the COA screen.

Adding an Account Code in Banking & COA > Chart of Accounts:

Add Account		×
New Account		
*Cycle:	FY24-25	
Account Type Group:	Expenditure -	
Fund:		
Function:		
Object:	▼	
Location:	•	
Description:		
*Account Type:	Expenditure -	
Budget Category:	•	
	Save Save and Add Car	ncel

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L COUE III B	anking & COA >		ounts.	
	Edit Account Code			×
	Instr Supplies Di	istrict		
	*Cycle:	FY24-25		
	Account Type Group:	Expenditure		
	Fund:	06-General Fund	•	
	Function:	1000-Instruction	•	
	Object:	619-Other Supplies and M	•	
	Location:	9900- District	•	
	Description:	Instr Supplies District		
	*Account Type:	Expenditure	•	
	Budget Category:		•	

Editing an Account Code in Banking & COA > Chart of Accounts:

The Comparative Financial Statements can be Sub-totaled by Budget Category.

ports		
Modules [All]	•	
Reports Comparative Finan	cial Statements 👻 😓	
[Unnamed Settings	Save Clear 🗢 -	
Cyc	e FY2425	
Subtotal E	Budget Category	
Account Expressio	n [Ail]	
Revenue Rollu	P Function	
Expenditure Rollu	P Function	
Begin Dat	e 07/01/2024	
End Dat	e 04/15/2025	
Prior Cycle Court	•	
Include Encumbrance	s No 👻	
	Display Options Display options Suppress Sub Totals Suppress Grouping Fit One Page Wide	
Page Orientatio	n Landscape	
💏 Report To PDF	cel 🛛 🕞 Report to CSV	

Save Save and Add Cancel