


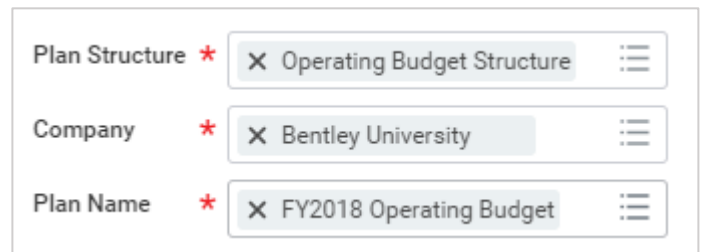
CREATING AN OPERATING BUDGET STRUCTURE AMENDMENT


Purpose: To successfully submit a transfer of budget dollars to better align with actual spending


- Helpful Hints:**
- You may search in any field by free typing in the box and hitting enter, this is useful when knowing only one or two key words
 - To decrease a budget use a negative “-” sign in front of the dollar amount
 - In order to enter information into a blank field, click the **Prompt** icon on the far right side of the box to display a list of available values to choose from. 
 - Fields with an asterisk (*) are required


1. Search **Create Budget Amendment** in the search bar.

2. Under **Plan Structure**, select **Operating Budget Structure**.



Plan Structure * 

Company * 

Plan Name * 

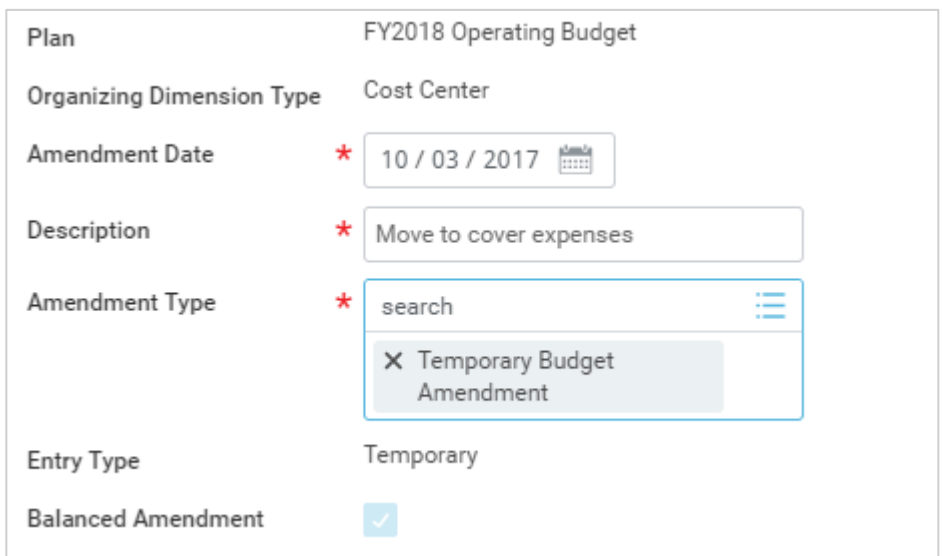
3. Under **Company** select Bentley University.

4. Under **Plan Name**, determine the fiscal year operating budget you want to use.

5. Click **Ok**


6. Select the amendment date you want to use.

7. Give a brief description of the amendment in the **Description** box




Plan FY2018 Operating Budget

Organizing Dimension Type Cost Center

Amendment Date * 

Description *


Amendment Type * 

Entry Type Temporary



Balanced Amendment

8. Select whether the amendment is temporary or permanent in the **Amendment Type** box.
9. Scroll down to the **Budget Amendment Lines** section.

Order	*Period	Ledger Account/Summary
+	X FY 2018 (FY2018 Operating Budget)	X 7000:Supplies Expense

10. Under the **Period** column, click the prompt icon on the far right of the box, and select the appropriate time period (there should only be one option). 
11. In the **Ledger Account/Summary** tab, select the account you want to increase.
12. Select the appropriate cost center under the ***Additional Worktags** tab, the ***Fund** will default when you select the cost center.
13. Determine the amount you would like to increase by in the **Amount Change** tab.
14. Under the **Memo** tab, you may provide any additional details.

*Worktags	Amount Change	Memo
X Cost Center: 1216 Marketing X Fund: 1100 Operating Fund - E&G	5,000.00	

15. Once completing the increase, click the  button, which will add a row to your transaction. There are two  buttons, both of which will perform the same task.

16. Under the **Period**, select the appropriate budget period (there should be only one option)
17. In the **Ledger Account/Summary** tab, select the account you want to decrease.

Budget Amendment Lines		Attachments	
Budget Amendment Lines 1 item			
+	Order	*Period	Ledger Account/Summary
+ -		X FY 2018 (FY2018 Operating Budget)	X 7203:Travel & Entertainment Expenses

18. Select the appropriate cost center in the ***Additional Worktags** tab, the ***Fund** will again default when you select the cost center.
19. Determine the amount you would like to **decrease** by in the **Amount Change** tab.
20. Provide any additional details in the **Memo field**.

*Worktags	Amount Change	Memo
X Cost Center: 1216 Marketing X Fund: 1100 Operating Fund - E&G	-5,000.00	

21. Note that the amount increase and amount decrease needs to balance in order to submit budget amendment. In order to make a decrease to a budget add a negative sign (-5,000) to the front of the number.
22. Click **Submit**.
23. Once submitted, the amendment will be sent to the Budget Office for approval.