

Manage Versions

This menu lets you create and manage planning budgets and amendments.

Help Files

Click the information icon to access step-by-step instructions for this particular menu.

Filter

Select options from the **Fiscal Year**, **PRC**, **Status** and/or **DPI Status** drop-down lists. The grid will automatically refresh. Leaving a drop-down list blank is the same as **All**.

Manage Versions ⓘ

Fiscal Year 2018 **PRC** **Status** Open **DPI Status** Open [+ Add](#)

Year ▼	Ver #	Description	Account Group	Date Started	Created By	Status	DPI Status	B/A	Amend #	
2018	0001	Testing	3.????103.???.???.???.???	03/28/2017		Open	Open	B		
2018	0002	Title I PRC 050	3.????050.???.???.???.???	02/28/2017		Open	Open	B		
2018	0001	Title I PRC 050	3.????050.???.???.???.???	11/28/2017	ADMIN	Open	Open	B		
2018	0001	108	3.????108.???.???.???.???	11/17/2017	ADMIN	Open	Open	B		

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Add

Click **Add** to create a new planning budget.

Select

Click the blue arrow icons to select a budget to edit.

General
This tab is used to manage general information about budget versions.

Read-only Fields
These 10 fields are automatically populated and read-only.

Costs
For Fund 3, the **Indirect Cost %** cannot exceed *DPIs* allowable percentage for the **PRC** you selected, and the **Administrative %** is automatically populated with *DPIs* percentage.

Change to Plan Narrative
This box is only required for Fund 3.

Version Description
This is automatically populated but can be updated.

EMPLOYER BENEFITS

Benefit	Salary %	Monthly Amt	Expense Code
RETIREMENT	0.00	0.00	2.222.222.221
Health	0.00	0.00	2.231.???.???.??
SS and Medicare	0.00	0.00	2.211.???.???.??

Employer Benefits
Use these fields to modify the benefits for this version.

Total Expenses
This section displays all expense accounts for a budget/amendment in numerical order, including the total amount for that expense account.

Communication Log
Remember to check these files frequently!

Employee Expenses
This menu lets you create, manage, and display all employee expenses.

Add Account
Click **Add Account** to add a new expense account.

New Account
Complete the fields that display.

Add Line
Click **Add Line** to add a line to the new expense account.

New Line
Click the fields that display in the **Pay Information**, **Employee Information**, and **Justification** sections.

Account Number	Account Description	Cost	Admin Cost	Justification	Account Total
<input type="text"/>	\$0.00				

Pay Freq	Pay Type	Hours/Day	Days/Period	Pay Periods	Months of Benefits
M	S	0.00	21.5	0	0.00

Current Rate	Current Salary	New Rate	New Salary
0.00	0.00	0.00	0.00

Employee #	Last Name	First Name	Position #	School	State Hire Date	Local Hire Date
<input type="text"/>	09/14/2020	09/14/2020				

Justification
<input type="text"/>

Non-Employee Expenses
This menu lets you create, manage, and display all employee expenses.

Add Account
Click **Add Account** to add a new non-expense account.

New Account
Complete the fields that display.

+ Add Account

Account Number	Description	Indirect Cost	Admin Cost	Justification	Line Status	Equip Line	Account Total
3.8200.108.399.000.000.00	Balanced Budget E	<input type="checkbox"/>	<input type="checkbox"/>		B	<input type="checkbox"/>	\$0.00

Item Quantity	Cost Per Item	Total Item Cost	Item Description	Item Justification
1	0.00	\$0.00	Balanced Budget Entry	

Revenue
This menu lets you manage revenue accounts and allotment amounts for each budget version.

Values Were Imported
If the allotment amounts have been imported from DPI, this box will be checked.

Highlighted Fields
Enter the **Planning Amount**, **Carryover Amount**, **Admin Carryover**, and **Transfer Ability Carryover**—as applicable.

Read-only Boxes
These boxes are DPI settings for this PRC and are read-only.

Update from Import
Click this button if the **Values were Imported** box is checked.

The interface includes a top navigation bar with tabs for General, Employee Expenses, Non-Employee Expenses, and Revenue. Below this are input fields for Account Group (3.????108.????.????.??), Fiscal Year (2018), Version # (0001), and Version Type (Budget). The main form area contains an Account Number field, a Total Allotment field, and a checkbox for Values Were Imported. Below these are input fields for Planning Amount (0.00), Actual Amount (0.00), Carryover Amount (0.00), Admin Carryover (0.00), and Transfer Ability Carryover (0.00). At the bottom are checkboxes for Forward Funded, Zero Allotment, Zero Carryover, and Planning Required. A blue button labeled 'Update from Import' is located at the bottom left.