

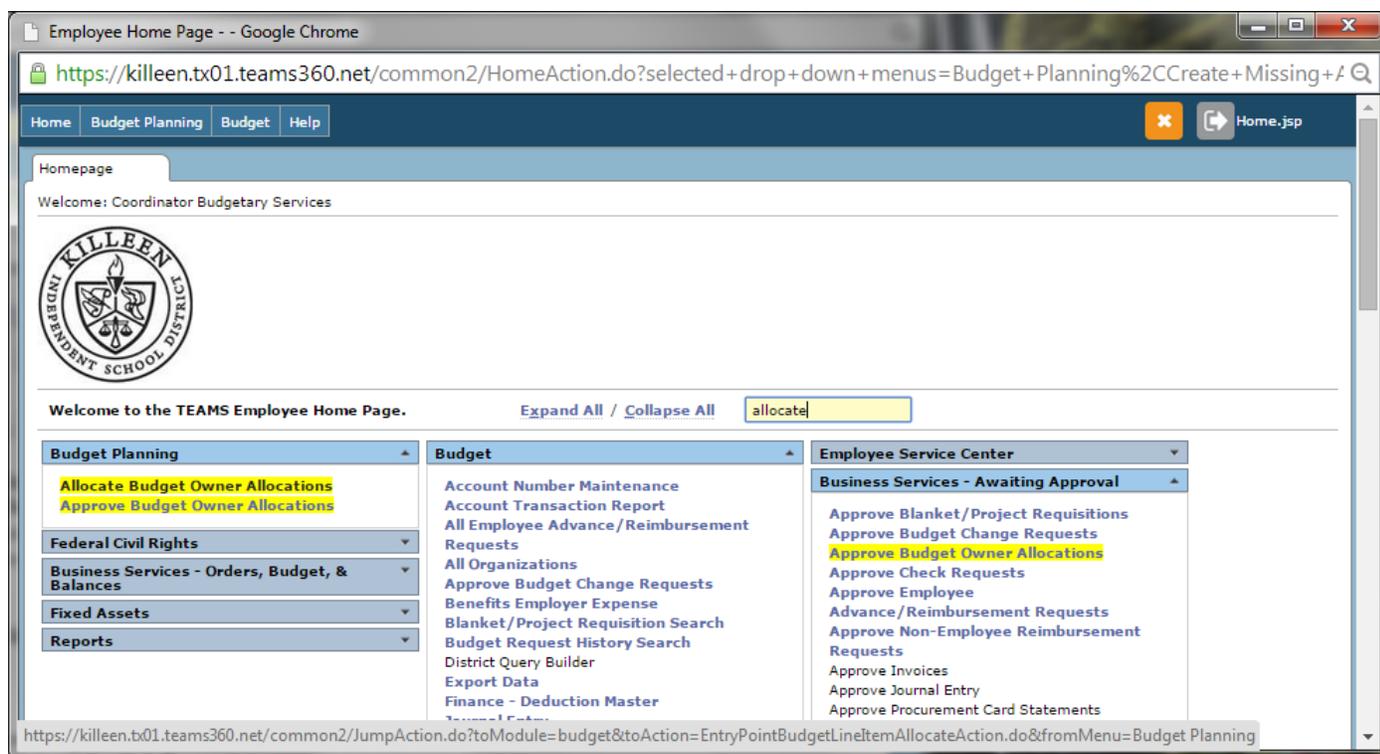
## ENTERING DATA INTO WORKSHEETS IN TEAMS

**Getting to the Worksheets to Allocate the Budget**

In order to enter data into a budget planning worksheet, an individual's position has to be given access to the worksheet. Worksheet access is granted by the Budget Department. **For budget planning, NO secretaries nor administrative assistants have been nor will be given access to enter information into a budget planning worksheet. The campus principal or department supervisor is responsible for planning the budget.** That person is the one who has access to plan the worksheet.

To get to the budget planning worksheet in TEAMS, from the TEAMS Home Page, in the search box:

- Type the word Allocate.
- When you do this, provided you have access to plan worksheets, you will see the link for ALLOCATE BUDGET OWNER ALLOCATIONS.



- Click on that link.
- Be sure the Fiscal Year shown at the top of the page is 2018. If it is not, then select 2018. (see pink arrow on screen-print below)
- Press the SEARCH button. (see green arrow on screen-print below)

**Budget Owner Allocation Search Criteria**

Budget Year: \* 2018  
Budget Owner: 730 - Budgetary Services  
Allocation: [Dropdown]  
Allocation Category: [Dropdown]  
Allocation Group: [Dropdown]  
Allocation Subgroup: [Dropdown]

Status: [Dropdown]  
Fund -Func-Obj -SubObj-Org-PI-Local: [Dropdown]  
My Budget Lines?  Yes  No  
Filter: [Dropdown]

**Budget Owner Allocations**

Sort | Clear Sorted by: (default)

Allocation	Budget Owner	Status	Curr/Next Approver	Org Allmnt	Avail Allmnt	Adjustment In	Adjustment Out	Allocatable Allmnt	Unallocated Amt	Curr Yr Adopted Bdgt	Curr Yr Amended Bdgt	Curr Yr Transaction	Prior Year Adopted Bdgt	Prior Year Amended Bdgt	Prior Yr Transaction
Org 730	730-Budgetary Services	Incompl		9,600.00	9,600.00	0.00	0.00	9,600.00	9,600.00	9,600.00	9,600.00	5,456.14	9,600.00	8,350.00	5,782.23

record count: 1 of 1

**Edit** **View**

➤ Anything you have access to plan is shown.

Click on the first line you see to highlight it. Then be sure to **press the EDIT button**, NOT the View button.

You will now have access to the worksheet to plan your budget.

Understanding the Parts of the Worksheet

The screenshot shows the 'Maintain Budget Owner Allocation' interface in Mozilla Firefox. At the top, a navigation bar includes 'Home', 'Budget Planning', 'Budget', 'Budget Management', and 'Help'. A status bar indicates 'Budget Year: 2016', 'wkbk: Open', 'Allocation/Owner: Org 730/730 (Flat)', 'Status: Incomplete', and 'Rev: Work In Progress'. Below this are tabs for 'Budget Owner Allocation', 'Assigning Managers', 'Allotment Adjustment', 'Version History', and 'Approval History'. The 'Allotment' section shows 'Available Budget Percent: 100.0', 'Recurring: Recurring with Allocation', and 'Allotment Amount: 9,600.00'. A table below shows 'Original Allotment', 'Avail Allotment', 'Adjustment In', 'Adjustment Out', and 'Allocatable Allotment', all with values of 9,600.00. A summary line shows 'Total Allocation Amount: 0.0' and 'Remainder Allocation Amount: 9600.0'. The main table has columns for 'Bdgt Acct', 'Description', 'Allocate PCT', 'Allocate Amt', 'Details', 'Explanation', 'Curr Adopted Bdgt', 'Curr Amended Bdgt', 'Curr Yr Tran', 'Curr Yr Diff', 'Pr Adopted Bdgt', 'Pr Yr Amended Bdgt', 'Pr Yr Tran', and 'Pr Yr Diff'. At the bottom, buttons include 'Distribute Based Prior Yr', 'Save Allocate', 'Reset', 'Submit For Approval', 'Print Worksheet', and 'Exit Worksheet'.

For anyone with a variable or flat rate allocation—shown at the top of the page following “Allocation/Owner” in parentheses, you must plan the worksheet to the penny. In this case, Budget Owner 730 is budgeted based on a Flat allocation (see pink arrow). If you plan 1 penny over or 1 penny under, TEAMS will not allow you to submit your worksheet.

The allotment amount can be seen at the top of the page under the bar “Allotment” (see purple arrow). At the top third of the page you’ll see a column with “Original Allotment.” That shows the amount originally allocated for this worksheet. The next column shows “Avail Allotment” and the final column shows “Allocatable Amount.” This is the amount you have available to plan.

Just above the big worksheet are 2 important items in tiny print. “Total Allocation Amount” and “Remainder Allocation Amount” (see blue arrows). These keep track of what you are planning in the worksheet whenever you make a change to

the cells. In this case, since nothing has been planned, it shows an amount of \$0 planned and \$9600 left to plan for this worksheet. You'll want to pay attention to these. For variable or flat rate allocations, if the remainder shows anything other than \$0, you will NOT be able to submit your worksheet.

The big worksheet looks similar to an Excel spreadsheet—it has rows and columns.

- Budgt Acct is the Budget Code where funds can be planned
- Description is the Account Description
- Allocate PCT can be used to allocate your worksheet by percentages. **It is best NOT to use this feature as it can sometimes cause issues with budgeting and rounding.** Instead use the Allocate Amt column next to it.
- Allocate Amt is the dollar amount you want to plan for that particular budget code. It can be planned to the penny using dollars and cents. **DO NOT USE DOLLAR SIGNS OR COMMAS** in this column or you will get an ERROR. (see green arrow)
- The next 3 columns "Details," "Explanations," and "Rsrv Pct" should not be used at this time.
- Curr Adopt Budgt shows the amount that has been adopted for that budget code in FY 2017.
- Curr Amend Bdgt shows the amended amount for that budget code in FY 2017.
- Curr Yr Tran shows the amount that's been spent out of that budget code for FY 2017.
- Curr Yr Diff is the difference between the amended budget and the transactions.
- Pr Adopted Bdgt shows the amount that was adopted for that budget code for FY 2016.
- Pr Yr Amended Bdgt shows the amount that was amended for that budget code for FY 2016.
- Pr Yr Tran shows the amount that was spent in FY 2016 using that budget code.
- Pr Yr Diff shows the difference between the amended budget and transactions for FY 2016—essentially, what was left on the table for that budget code.

### Entering Data into the Worksheet

Go to the "Allocate Amt" column (see green arrow on screen-print on page N-3) to enter the dollar amount you want to plan for each budget code shown. If you don't want to budget anything, leave the amount as 0.

Use the scroll bars (see red circle on screen-print on page N-3) to scroll up and down and left to right in the worksheet. Also, many worksheets have more than 1 page available to be planned. For these you will see numbers at the top of the worksheet. Click on the number to get to that page (see pink circle on screen print below). The worksheet below has 3 pages available. The maximum number of rows on a worksheet page is 25. In the case of this worksheet, page 1 contains rows 1 to 25 of 58 rows. Page 2 will have rows 26 to 50. Page 3 will have rows 51 to 58. You can move forward or backward by clicking on the page number.

Maintain Budget Owner Allocation - - Mozilla Firefox  
https://tr1-killeen.tx01.teams360.net/budget/BudgetWorksheetMaintenanceEditAction.do

Home Budget Planning Budget Budget Management Help

Budget Year: 2016 wkbk: Open Allocation/Owner: Org 750/750 (Zero Based) Status: Incomplete Rev: Work In Progress

Budget Owner Allocation Assigning Managers Allotment Adjustment Version History Approval History

**Allotment**  
Available Budget Percent: 100.0 Recurring: Recurring with Allocation  
Allotment Amount: 0.00 Justification:   
Original Allotment Avail Allotment Adjustment In Adjustment Out Allocatable Allotment  
0.00 0.00 0.00 0.00 0.00 0.00  
Total Allocation Amount: 0.0 Remainder Allocation Amount: 0.0  
Result Page: 1 | 2 | 3 Results 1-25 of 58

Bdgt Acct	Description	Allocate PCT	Allocate Amt	Details	Explanation	Curr Adopted Bdgt	Curr Amended Bdgt	Curr Yr Tran	Curr Yr Diff	Pr Adopted Bdgt	Pr Yr Amended Bdgt	Pr Yr Tran	Pr Yr Diff
199-41-6118-00-750-99-ELC	Supplemental Salaries (TRS)	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6121-00-750-99-ELC	Supplemental/FLSA	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	592.61	484.29	108.32
199-41-6121-00-750-99-IA0	Supplemental/FLSA	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6125-00-750-99-ELC	Temporary Salaries-Election	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	560.00	560.00	0.00
199-41-6125-00-750-99-IA0	Temporary Salaries	0.00	0.00	Details		16,500.00	16,500.00	4,467.54	12,032.46	16,500.00	13,538.27	13,538.27	0.00
199-41-6138-00-750-99-ELC	Flex Benefits	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6138-00-750-99-IA0	Flex Benefits	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6141-00-750-99-ELC	Social Security	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	48.35	49.83	-1.48
199-41-6141-00-750-99-IA0	Social Security	0.00	0.00	Details		0.00	0.00	341.77	-341.77	0.00	1,035.68	1,035.68	0.00
199-41-6141-00-750-99-IRS	Social Security Penalty from IRS	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6142-00-750-99-ELC	HealthLife Insurance	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6142-00-750-99-IA0	HealthLife Insurance	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6143-00-750-99-ELC	Workers Compensation	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	17.40	19.32	-1.92

Distribute Based Prior Yr Save Allocate Reset Submit For Approval Print Worksheet

Exit Worksheet

There is a button “DISTRIBUTE BASED\_PRIOR\_YR” (see red arrow above). **The recommendation is NOT to use this button.** It does NOT distribute exactly as the prior year’s allocation (see pink boxes below). The system takes rounded percentages of the current year’s adopted budget amounts and calculates the amount to plan based on this. This will generally leave your worksheet either over or under planned.

Budget Owner Allocation - - Mozilla Firefox  
 https://tr1-killen.b01.teams360.net/budget/BudgetLineItemMaintenancePriorYrAction.do

Home Budget Planning Budget Budget Management Help

Budget Line Item Maintenance.jsp

Budget Year: 2016 wkbk: Open Allocation/Owner: Org 730/730 (Flat) Status: Incomplete Rev: Work In Progress

Budget Owner Allocation Assigning Managers Allotment Adjustment Version History Approval History

**Allotment**  
 Available Budget Percent: 100.0 Recurring: Recurring with Allocation  
 Allotment Amount: 9,600.00 Justification:   
 Characters remaining: 500 ( 500 max)

Original Allotment Avail Allotment Adjustment In Adjustment Out Allocatable Allotment

9,600.00 9,600.00 0.00 0.00 9,600.00

Total Allocation Amount: 9599.04 Remainder Allocation Amount: 0.96  
 Result Page: 1 || Results 1-17 of 17

Bdgt Acct	Description	Allocate PCT	Allocate Amt	Details	Explanation	Curr Adopted Bdgt	Curr Amended Bdgt	Curr Yr Tran	Curr Yr Diff	Pr Adopted Bdgt	Pr Yr Amended Bdgt	Pr Yr Tran	Pr Yr Diff
199-41-6121-00-730-99-000	Supplemental/FLSA	2.08	199.88	Details		200.00	260.00	259.76	0.24	450.00	450.00	0.00	450.00
199-41-6125-00-730-99-000	Temporary Salaries	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6249-00-730-99-000	Contracted Maintenance & Rep	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6291-00-730-99-000	Consulting Services	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6299-00-730-99-000	Miscellaneous Contracted Serv	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6329-00-730-99-000	Reading Material	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6393-00-730-99-000	Furniture	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6394-00-730-99-000	Technology Supplies	0.00	0.00	Details		0.00	440.00	147.99	292.01	0.00	0.00	0.00	0.00
199-41-6396-00-730-99-000	Software & Licenses	0.00	0.00	Details		0.00	260.00	0.00	260.00	0.00	260.00	260.00	0.00
199-41-6397-00-730-99-000	In-District Printing	10.47	1,005.12	Details		1,005.00	505.00	0.00	505.00	1,005.00	1,005.00	0.00	1,005.00
199-41-6399-00-730-99-000	General Supplies	65.10	6,249.60	Details		6,250.00	4,818.00	1,693.45	2,924.55	6,000.00	5,630.00	4,409.35	1,220.65
199-41-6399-00-730-99-TR0	General Supplies	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6411-00-730-99-000	Travel	15.57	1,494.72	Details		1,495.00	1,465.00	528.99	936.01	1,495.00	1,495.00	209.49	1,285.51

Save Allocate Reset Submit For Approval Print Worksheet

Exit Worksheet

**Saving Data in the Worksheet**

Be sure to SAVE your worksheet so you don't lose your changes. To save the worksheet you press the "SAVE ALLOCATE" button on the bottom of the screen (see pink arrow on screen-print below).

Budget Year: 2016      wkbk: Open      Allocation/Owner: Org 730/730 (Flat)      Status: Incomplete      Rev: Work In Progress

Budget Owner Allocation    Assigning Managers    Allotment Adjustment    Version History    Approval History

**Allotment**

Available Budget Percent: 100.0      Recurring: Recurring with Allocation

Allotment Amount: 9,600.00      Justification:  Characters remaining: 500 ( 500 max)

Original Allotment      Avail Allotment      Adjustment In      Adjustment Out      Allocatable Allotment

9,600.00      9,600.00      0.00      0.00      9,600.00

Total Allocation Amount: 9600.0      Remainder Allocation Amount: 0.0

Result Page: 1 || Results 1-17 of 17

Bdgt Acct	Description	Allocate PCT	Allocate Amt	Details	Explanation	Curr Adopted Bdgt	Curr Amended Bdgt	Curr Yr Tran	Curr Yr Diff	Pr Adopted Bdgt	Pr Yr Amended Bdgt	Pr Yr Tran	Pr Yr Diff
199-41-6121-00-730-99-000	Supplemental/FLSA	2.08	200.00	<a href="#">Details</a>		200.00	260.00	259.76	0.24	450.00	450.00	0.00	450.00
199-41-6125-00-730-99-000	Temporary Salaries	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6249-00-730-99-000	Contracted Maintenance & Rep	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6291-00-730-99-000	Consulting Services	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6299-00-730-99-000	Miscellaneous Contracted Serv	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6329-00-730-99-000	Reading Material	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6393-00-730-99-000	Furniture	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6394-00-730-99-000	Technology Supplies	4.58	440.00	<a href="#">Details</a>		0.00	440.00	147.99	292.01	0.00	0.00	0.00	0.00
199-41-6396-00-730-99-000	Software & Licenses	2.71	260.00	<a href="#">Details</a>		0.00	260.00	0.00	260.00	0.00	260.00	260.00	0.00
199-41-6397-00-730-99-000	In-District Printing	2.08	200.00	<a href="#">Details</a>		1,005.00	505.00	0.00	505.00	1,005.00	1,005.00	0.00	1,005.00
199-41-6399-00-730-99-000	General Supplies	69.84	6,705.00	<a href="#">Details</a>		6,250.00	4,618.00	1,693.45	2,924.55	6,000.00	5,630.00	4,409.35	1,220.65
199-41-6399-00-730-99-TR0	General Supplies	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6411-00-730-99-000	Travel	15.57	1,495.00	<a href="#">Details</a>		1,495.00	1,465.00	528.99	936.01	1,495.00	1,495.00	209.49	1,285.51

Save Allocate    Reset    Submit For Approval    Print Worksheet    Exit Worksheet

**Exiting the Worksheet**

To exit the worksheet, press the “EXIT WORKSHEET” button at the bottom of the page (see green arrow above).

PRINTING WORKSHEETS AS ENTERED IN TEAMS

You may want to print a copy of the worksheet that you've planned. To do this, you must be in the worksheet itself. Follow the steps in the previous section to get into the worksheet. Once you are in the worksheet, to print a copy of what you've entered, press the "PRINT WORKSHEET" button on the bottom of the worksheet screen (see pink arrow below).

Budget Year: 2016      wkbk: Open      Allocation/Owner: Org 730/730 (Flat)      Status: Incomplete      Rev: Work In Progress

Budget Owner Allocation    Assigning Managers    Allotment Adjustment    Version History    Approval History

**Allotment**

Available Budget Percent: 100.0      Recurring: Recurring with Allocation

Allotment Amount: 9,600.00      Justification:       Characters remaining: 500 ( 500 max)

Original Allotment      Avail Allotment      Adjustment In      Adjustment Out      Allocatable Allotment

9,600.00      9,600.00      0.00      0.00      9,600.00

Total Allocation Amount: 9600.0      Remainder Allocation Amount: 0.0

Result Page: 1 || Results 1-17 of 17

Bdgt Acct	Description	Allocate PCT	Allocate Amt	Details	Explanation	Curr Adopted Bdgt	Curr Amended Bdgt	Curr Yr Tran	Curr Yr Diff	Pr Adopted Bdgt	Pr Yr Amended Bdgt	Pr Yr Tran	Pr Yr Diff
199-41-6121-00-730-99-000	Supplemental/FLSA	2.08	200.00	<a href="#">Details</a>		200.00	260.00	259.76	0.24	450.00	450.00	0.00	450.00
199-41-6125-00-730-99-000	Temporary Salaries	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6249-00-730-99-000	Contracted Maintenance & Rep	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6291-00-730-99-000	Consulting Services	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6299-00-730-99-000	Miscellaneous Contracted Serv	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6329-00-730-99-000	Reading Material	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6393-00-730-99-000	Furniture	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6394-00-730-99-000	Technology Supplies	4.58	440.00	<a href="#">Details</a>		0.00	440.00	147.99	292.01	0.00	0.00	0.00	0.00
199-41-6396-00-730-99-000	Software & Licenses	2.71	260.00	<a href="#">Details</a>		0.00	260.00	0.00	260.00	0.00	260.00	260.00	0.00
199-41-6397-00-730-99-000	In-District Printing	2.08	200.00	<a href="#">Details</a>		1,005.00	505.00	0.00	505.00	1,005.00	1,005.00	0.00	1,005.00
199-41-6399-00-730-99-000	General Supplies	69.84	6,705.00	<a href="#">Details</a>		6,250.00	4,618.00	1,693.45	2,924.55	6,000.00	5,630.00	4,409.35	1,220.65
199-41-6399-00-730-99-TR0	General Supplies	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6411-00-730-99-000	Travel	15.57	1,495.00	<a href="#">Details</a>		1,495.00	1,465.00	528.99	936.01	1,495.00	1,495.00	209.49	1,285.51

Save Allocate    Reset    Submit For Approval    **Print Worksheet**    Exit Worksheet

Once you do this, another box will open with 2 links. Clicking on one link will allow you to open the report as an Excel file (see orange arrow on screen-print below). Clicking on the other link will allow you to open the report as an Adobe PDF file (see green arrow on screen print below).

**Budget Owner Allocation** | Assigning Managers | Allotment Adjustment | Version History | Approval History

Budget Year: 2016 | wkbk: Open | Allocation/Owner: Org 730/730 (Flat) | Status: Incomplete | Rev: Work In Progress

Available Budget Percent: 100.0 | Recurring: Recurring with Allocation

Allotment Amount: 9,600.00 | Justification: [ ]

Original Allotment: 9,600.00 | Avail Allotment: 9,600.00 | Adjustment In: 0.00 | Adjustment Out: 0.00 | Allocatable Allotment: 9,600.00

Total Allocation Amount: 9600.0 | Remainder Allocation Amount: 0.0

Bdgt Acct	Description	Allocate PCT	Pr Yr Diff	Pr Yr Adopted Bdgt	Pr Yr Amended Bdgt	Pr Yr Tran	Pr Yr Diff
199-41-6121-00-730-99-000	Supplemental/FLSA	2.08	0.24	450.00	450.00	0.00	450.00
199-41-6125-00-730-99-000	Temporary Salaries	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6249-00-730-99-000	Contracted Maintenance & Rep	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6291-00-730-99-000	Consulting Services	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6299-00-730-99-000	Miscellaneous Contracted Serv	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6329-00-730-99-000	Reading Material	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6393-00-730-99-000	Furniture	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6394-00-730-99-000	Technology Supplies	4.58	0.00	440.00	147.99	292.01	0.00
199-41-6396-00-730-99-000	Software & Licenses	2.71	0.00	260.00	0.00	260.00	260.00
199-41-6397-00-730-99-000	In-District Printing	2.08	1,005.00	505.00	0.00	1,005.00	0.00
199-41-6399-00-730-99-000	General Supplies	69.84	6,250.00	4,618.00	1,693.45	2,924.55	6,000.00
199-41-6399-00-730-99-TR0	General Supplies	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6411-00-730-99-000	Travel	15.57	1,495.00	1,465.00	528.99	936.01	1,495.00

**WARNINGS:**

- ✓ If you want to Print your worksheet, you MUST do so PRIOR to submitting the worksheet for approval!
- ✓ The printed report will NOT look exactly like the worksheet nor will it have all the same information (see screenshot below for copy of PDF file).

Allocation: Org 730  
 Alloc Cat: ALL  
 Alloc Grp: ALL  
 Alloc Sub Grp: ALL

**Budget Owner Allocations by Allocation - Detail**  
 Budget Year: 2016 | Workbook: Open

Budget Owner: 730  
 Bdgt Owner Grp: Central Orgs  
 Print Date/Time: 03/11/2015 12:15 pm

Allocation/Owner (Type)	Avail Bdgt PCT	Allot per unit	Students	Orig Allotment	Adj In	Adj Out	Total Allotment	Total Allocated	Avail Allotment Status
Org 730 / 730 Budgetary Services (Flat)	100.00	14,600.00		9,600.00			9,600.00	9,600.00	9,600.00 Incomplete

Bdgt Acct	Description	Aloc PCT	Allocate Amt	Explanation	Curr Adopted Bdgt	Curr Amended Bdgt	Curr Yr Tran	Curr Yr Diff
199-41-6121-00-730-99-000	Supplemental/FLSA	2.08	200.00	Supplemental/FLSA	200.00	260.00	259.76	0.24

SUBMITTING WORKSHEETS FOR APPROVAL IN TEAMS

Entering information into a worksheet is the first step in getting a budget for the next fiscal year. Once the data has been entered on the worksheet and you are comfortable with it, **you must SUBMIT the worksheet for approval.**

The screenshot displays the 'Maintain Budget Owner Allocation' interface. At the top, there are navigation tabs: Home, Budget Planning, Budget, and Help. A green arrow points to the 'Budget Line Item Maintenance' icon. The main header shows 'Budget Year: 2016', 'wkbk: Open', 'Allocation/Owner: Org 730/730 (Flat)', 'Status: Incomplete', and 'Rev: Work In Progress'. Below this, there are tabs for 'Budget Owner Allocation', 'Assigning Managers', 'Allotment Adjustment', 'Version History', and 'Approval History'. The 'Allotment' section shows 'Available Budget Percent: 100.0', 'Recurring: Recurring with Allocation', and 'Allotment Amount: 9,600.00'. A justification box is present with 'Characters remaining: 500 (500 max)'. A summary row shows 'Original Allotment' and 'Avail Allotment' both at 9,600.00, with 'Adjustment In' and 'Adjustment Out' at 0.00, and 'Allocatable Allotment' at 9,600.00. Below this, it states 'Total Allocation Amount: 9600.0' and 'Remainder Allocation Amount: 0.0'. A table lists 17 budget accounts with columns for Bdgct Acct, Description, Allocate PCT, Allocate Amt, Details, Explanation, Curr Adopted Bdgct, Curr Amended Bdgct, Curr Yr Tran, Curr Yr Diff, Pr Adopted Bdgct, Pr Yr Amended Bdgct, Pr Yr Tran, and Pr Yr Diff. At the bottom, there are buttons for 'Save Allocate', 'Reset', 'Submit For Approval' (highlighted with a pink arrow), 'Print Worksheet', and 'Exit Worksheet'.

Bdgct Acct	Description	Allocate PCT	Allocate Amt	Details	Explanation	Curr Adopted Bdgct	Curr Amended Bdgct	Curr Yr Tran	Curr Yr Diff	Pr Adopted Bdgct	Pr Yr Amended Bdgct	Pr Yr Tran	Pr Yr Diff
199-41-6121-00-730-99-000	Supplemental/FLSA	2.08	200.00	Details		200.00	260.00	259.76	0.24	450.00	450.00	0.00	450.00
199-41-6125-00-730-99-000	Temporary Salaries	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6249-00-730-99-000	Contracted Maintenance & Rep	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6291-00-730-99-000	Consulting Services	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6299-00-730-99-000	Miscellaneous Contracted Serv	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6329-00-730-99-000	Reading Material	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6393-00-730-99-000	Furniture	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6394-00-730-99-000	Technology Supplies	4.58	440.00	Details		0.00	440.00	147.99	292.01	0.00	0.00	0.00	0.00
199-41-6396-00-730-99-000	Software & Licenses	2.71	260.00	Details		0.00	260.00	0.00	260.00	0.00	260.00	260.00	0.00
199-41-6397-00-730-99-000	In-District Printing	2.08	200.00	Details		1,005.00	505.00	0.00	505.00	1,005.00	1,005.00	0.00	1,005.00
199-41-6399-00-730-99-000	General Supplies	69.84	6,705.00	Details		6,250.00	4,618.00	1,693.45	2,924.55	6,000.00	5,630.00	4,409.35	1,220.65
199-41-6399-00-730-99-TR0	General Supplies	0.00	0.00	Details		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6411-00-730-99-000	Travel	15.57	1,495.00	Details		1,495.00	1,465.00	528.99	936.01	1,495.00	1,495.00	209.49	1,285.51

To submit the worksheet for approval, go into the worksheet. At the bottom of the worksheet is a button “SUBMIT FOR APPROVAL” (see pink arrow on screen-print above). Press this button. Another box will pop up asking if you’re sure you want to submit the allocation. Choose YES and, if you have allocated your worksheet correctly (the Remainder Allocation Amount is 0 for Flat and Variable Allocations), your worksheet will now have its status changed from “Incomplete” to “Approval in Progress” and will go the first approver’s approval queue.

**WARNING**

- If you have a Flat or Variable Allocation and you have UNDERPLANNED your worksheet (did not plan the full amount), after you press the “Submit for Approval” button and “Yes” button, you will get an error message in small red font toward the top of your worksheet (see pink arrow below) letting you know how much has not been planned.
- To fix this, allocate the amount that remains to one or more budget codes shown in your worksheet, SAVE the worksheet, then SUBMIT FOR APPROVAL again.
- Once a worksheet has been submitted for approval, NO CHANGES CAN BE MADE UNLESS AN APPROVER DENIES IT.

Budget Year: 2016      wkbk: Open      Allocation/Owner: Org 730/730 (Flat)      Status: Incomplete      Rev: Work In Progress

**There is un-allocated allotment 1.0**

Budget Owner Allocation    Assigning Managers    Allotment Adjustment    Version History    Approval History

**Allotment**  
 Available Budget Percent: 100.0    Recurring: Recurring with Allocation  
 Allotment Amount: 9,600.00    Justification:   
 Characters remaining: 500 ( 500 max)

Original Allotment	Avail Allotment	Adjustment In	Adjustment Out	Allocatable Allotment
9,600.00	9,600.00	0.00	0.00	9,600.00

Total Allocation Amount:    Remainder Allocation Amount:

Result Page:

BdgAcct	Description	Allocate PCT	Allocate Amt	Details	Explanation	Curr Adopted Bdg	Curr Amended Bdg	Curr Yr Tran	Curr Yr Diff	Pr Adopted Bdg	Pr Yr Amended Bdg	Pr Yr Tran	Pr Yr Diff
199-41-6121-00-730-99-000	Supplemental/FLSA	2.07	199.00	<a href="#">Details</a>		200.00	260.00	259.76	0.24	450.00	450.00	0.00	450.00
199-41-6125-00-730-99-000	Temporary Salaries	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6249-00-730-99-000	Contracted Maintenance & Rep	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6291-00-730-99-000	Consulting Services	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6299-00-730-99-000	Miscellaneous Contracted Serv	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6329-00-730-99-000	Reading Material	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6393-00-730-99-000	Furniture	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6394-00-730-99-000	Technology Supplies	4.58	440.00	<a href="#">Details</a>		0.00	440.00	147.99	292.01	0.00	0.00	0.00	0.00
199-41-6396-00-730-99-000	Software & Licenses	2.71	260.00	<a href="#">Details</a>		0.00	260.00	0.00	260.00	0.00	260.00	260.00	0.00
199-41-6397-00-730-99-000	In-District Printing	2.08	200.00	<a href="#">Details</a>		1,005.00	505.00	0.00	505.00	1,005.00	1,005.00	0.00	1,005.00
199-41-6399-00-730-99-000	General Supplies	69.84	6,705.00	<a href="#">Details</a>		6,250.00	4,618.00	1,693.45	2,924.55	6,000.00	5,630.00	4,409.35	1,220.65
199-41-6399-00-730-99-TR0	General Supplies	0.00	0.00	<a href="#">Details</a>		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6411-00-730-99-000	Travel	15.57	1,495.00	<a href="#">Details</a>		1,495.00	1,465.00	528.99	936.01	1,495.00	1,495.00	209.49	1,285.51

[Save Allocate](#)    [Reset](#)    [Submit For Approval](#)    [Print Worksheet](#)

**Successfully Submitting Worksheet for Approval**

If your worksheet has been successfully submitted for approval, you will see a message in small blue font indicating that “budget owner allocation submitted for approval” (see orange circle on screen-print below) and your worksheet status will be changed from “Incomplete” to “Approval in Progress” (see pink arrow on screen print below).

You can now Exit from the worksheet by pressing the “EXIT WORKSHEET” button (see green arrow on screen-print below).

Budget Year: 2015    Allocation/Owner: Org 730/730 (Flat)    Status: Approval in Progress    Rev: Work In Progress

budget owner allocation submitted for approval

**Allotment**

Available Budget Percent: 100.0    Recurring: Recurring with Allocation

Allotment Amount: 9,600.00    Justification:

Original Allotment    Avail Allotment    Adjustment In    Adjustment Out    Allocatable Allotment

Bdgt Acct	Description	Allocate PCT	Allocate Amt	Details	Explanation	Rsrv PCT	Curr Adopted Bdgt	Curr Amended Bdgt	Curr Yr Tran	Curr Yr Diff	Pr Adopted Bdgt	Pr Yr Amended Bdgt	Pr Yr Tran	Pr Yr Diff
199-41-6121-00-730-99-000	Supplemental/FLSA	2.08	200.00				200.00	260.00	259.76	0.24	450.00	450.00	0.00	450.00
199-41-6125-00-730-99-000	Temporary Salaries	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6249-00-730-99-000	Contracted Maintenance & Rep	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6291-00-730-99-000	Consulting Services	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6299-00-730-99-000	Miscellaneous Contracted Serv	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6329-00-730-99-000	Reading Material	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6393-00-730-99-000	Furniture	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6394-00-730-99-000	Technology Supplies	4.58	440.00				0.00	440.00	147.99	292.01	0.00	0.00	0.00	0.00
199-41-6396-00-730-99-000	Software & Licenses	2.71	260.00				0.00	260.00	0.00	260.00	0.00	260.00	260.00	0.00
199-41-6397-00-730-99-000	In-District Printing	2.08	200.00				1,005.00	505.00	0.00	505.00	1,005.00	1,005.00	0.00	1,005.00
199-41-6399-00-730-99-000	General Supplies	69.84	6,705.00				6,250.00	4,618.00	1,693.45	2,924.55	6,000.00	5,630.00	4,409.35	1,220.65
199-41-6399-00-730-99-TR0	General Supplies	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6411-00-730-99-000	Travel	15.57	1,495.00				1,495.00	1,465.00	528.99	936.01	1,495.00	1,495.00	209.49	1,285.51

Print Worksheet    Exit Worksheet

## APPROVING WORKSHEETS IN TEAMS

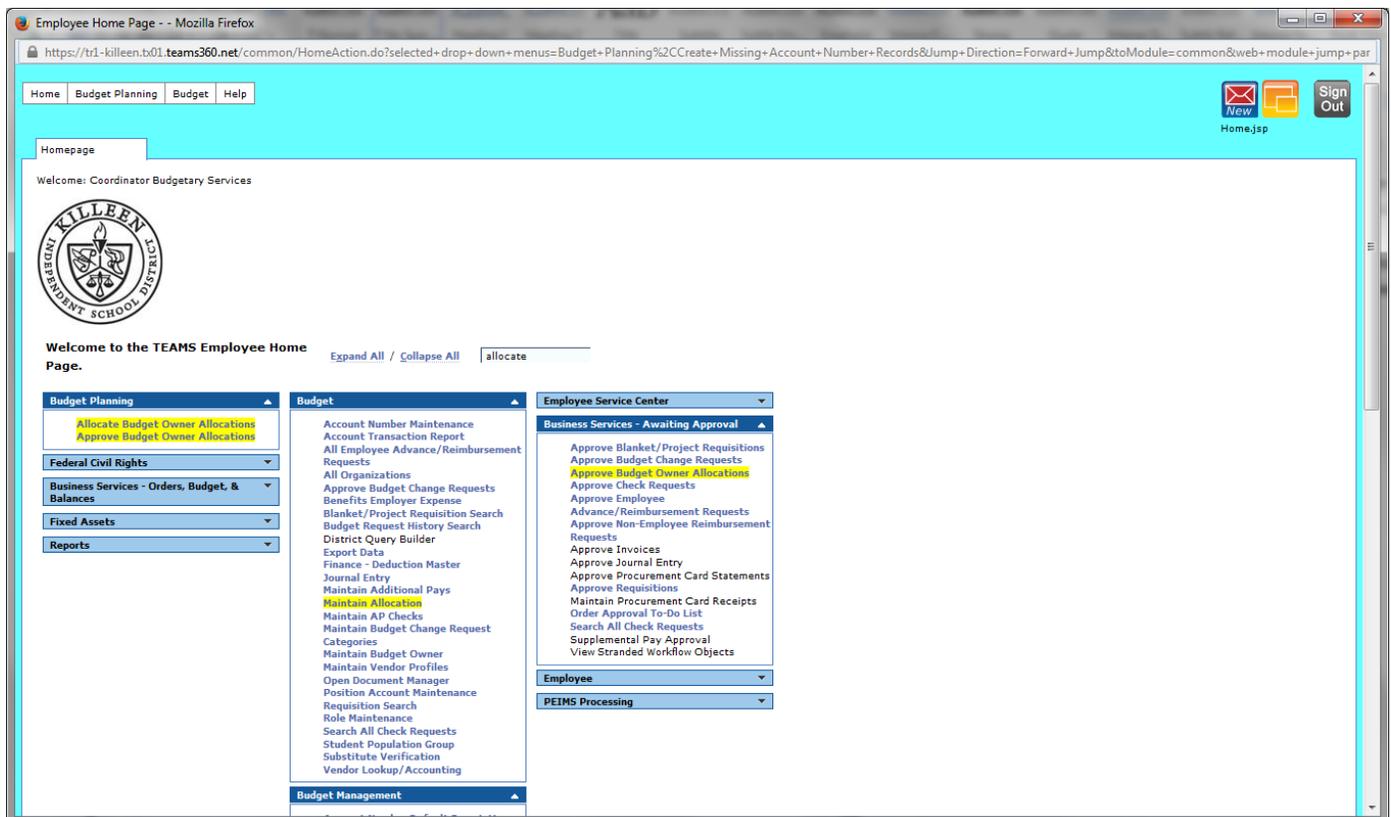
### Who Must Approve??

In TEAMS, if you are able to plan a budget worksheet, you must also be the first to approve the worksheet. So, **after you submit the worksheet for approval YOU NEED TO GO IN AND APPROVE THE WORKSHEET.**

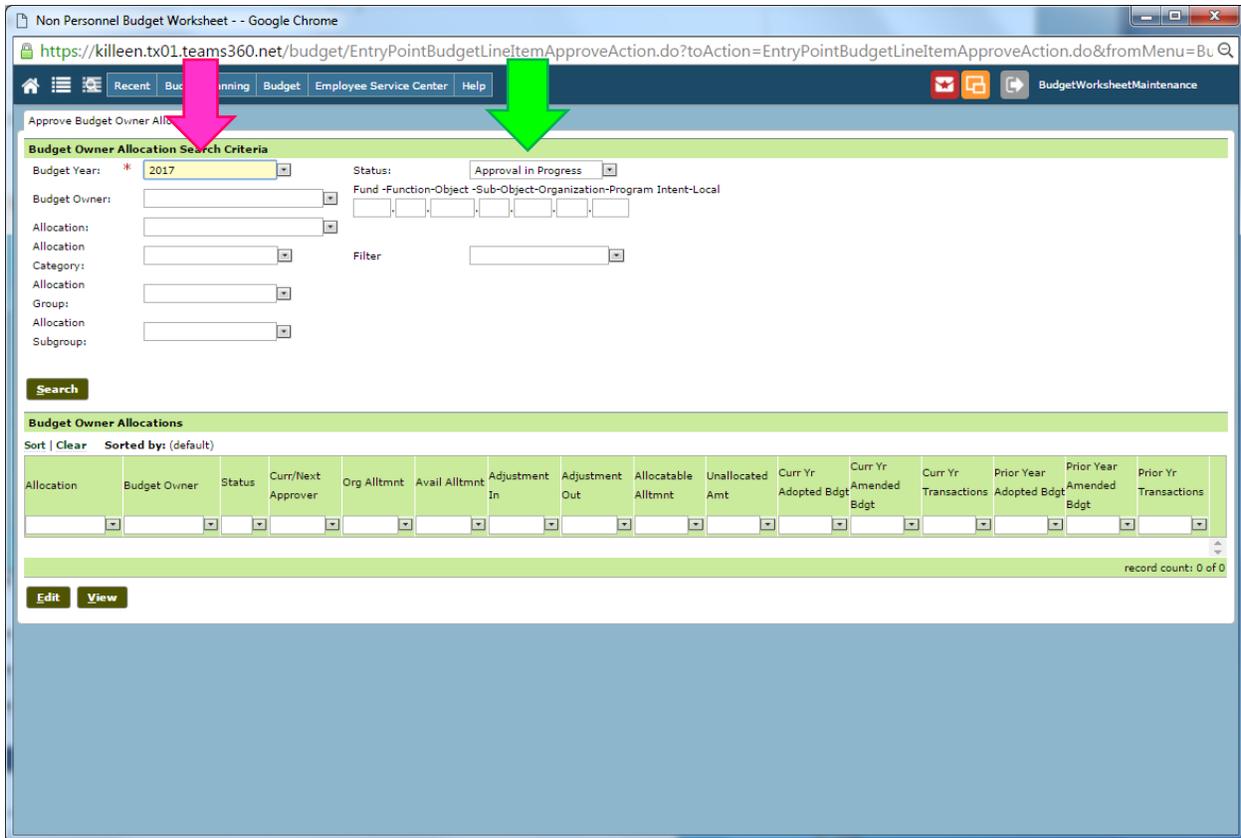
### Getting to the Worksheets to Approve Them

To get to the budget planning worksheets in TEAMS to approve them, from the TEAMS Home Page, in the search box:

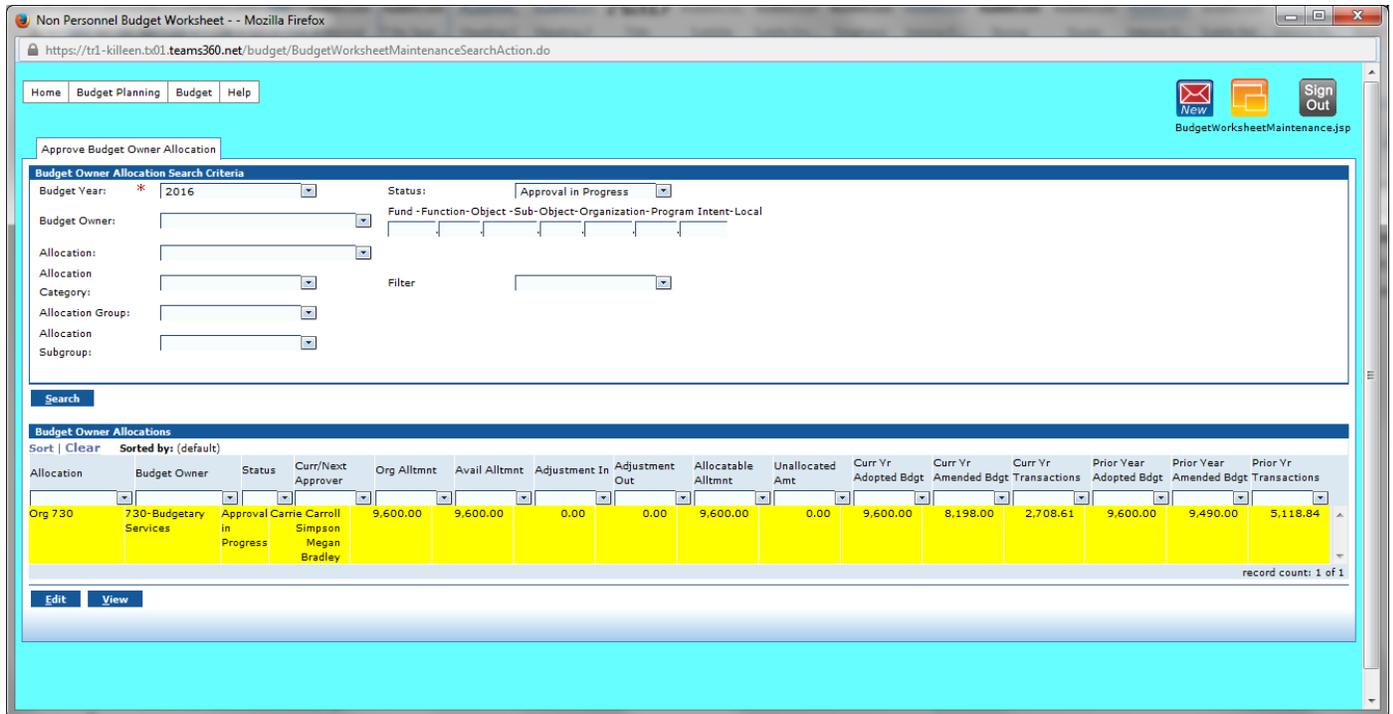
- Type the word Allocate
- When you do this, provided you have access to plan worksheets, you will see the link for APPROVE BUDGET OWNER ALLOCATIONS.



- Click on that link. It should take you to a screen that looks like the screen-print below.



- Be sure the Fiscal Year shown at the top of the page is 2018. If it is not, then select 2018. (see pink arrow above)
- Be sure the Status is shown as “Approval in Progress” (see green arrow above)
- Press the SEARCH button.
- Anything you have access to APPROVE is shown.



- Click on the first line you see to highlight it. **Then be sure to press the EDIT button, NOT the View button.**
- You will now have access to the worksheet to approve.
- To approve the worksheet, press the “APPROVE” button (see pink arrow on screen-print below).

Budget Year: 2016      wkbk: Open      Allocation/Owner: Org 730/730 (Flat)      Status: Approval in Progress      Rev: Work In Progress

Budget Owner Allocation    Assigning Managers    Allotment Adjustment    Version History    Approval History

**Allotment**  
 Available Budget Percent: 100.0      Recurring: Recurring with Allocation  
 Allotment Amount: 9,600.00      Justification:   
 Characters remaining: 500 ( 500 max)

Original Allotment      Avail Allotment      Adjustment In      Adjustment Out      Allocatable Allotment

9,600.00      9,600.00      0.00      0.00      9,600.00

Total Allocation Amount: 9600.0      Remainder Allocation Amount: 0.0  
 Result Page: 1 || Results 1-17 of 17

Bdgct Acct	Description	Allocate PCT	Allocate Amt	Details	Explanation	Rsrv PCT	Curr Adopted Bdgdt	Curr Amended Bdgdt	Curr Yr Tran	Curr Yr Diff	Pr Adopted Bdgdt	Pr Yr Amended Bdgdt	Pr Yr Tran	Pr Yr Diff
199-41-6121-00-730-99-000	Supplemental/FLSA	2.08	200.00				200.00	260.00	259.76	0.24	450.00	450.00	0.00	450.00
199-41-6125-00-730-99-000	Temporary Salaries	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6249-00-730-99-000	Contracted Maintenance & Rep	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6291-00-730-99-000	Consulting Services	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6299-00-730-99-000	Miscellaneous Contracted Serv	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6329-00-730-99-000	Reading Material	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6393-00-730-99-000	Furniture	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6394-00-730-99-000	Technology Supplies	4.58	440.00				0.00	440.00	147.99	292.01	0.00	0.00	0.00	0.00
199-41-6396-00-730-99-000	Software & Licenses	2.71	260.00				0.00	260.00	0.00	260.00	0.00	260.00	260.00	0.00
199-41-6397-00-730-99-000	In-District Printing	2.08	200.00				1,005.00	505.00	0.00	505.00	1,005.00	1,005.00	0.00	1,005.00
199-41-6399-00-730-99-000	General Supplies	69.84	6,705.00				6,250.00	4,618.00	1,693.45	2,924.55	6,000.00	5,630.00	4,409.35	1,220.65
199-41-6399-00-730-99-TR0	General Supplies	0.00	0.00				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
199-41-6411-00-730-99-000	Travel	15.57	1,495.00				1,495.00	1,465.00	528.99	936.01	1,495.00	1,495.00	209.49	1,285.51

Deny      Approve      Deny      Print Worksheet

Approvers cannot make any changes to worksheets. Once a worksheet has been submitted, the only options for approvers are Approve or Deny.

**WARNING ON PRESSING DENY**

If you deny a worksheet because something needs to be changed, **PLEASE SEND AN E-MAIL TO DL – BUDGETARY SERVICES** letting us know. Once a worksheet is Denied, TEAMS does NOT have the worksheet go back to the Budget Owner. The worksheet will have a status of DENIED and the allocation will NOT be budgeted!