

Add a New Budget Year

Budgets are set on a yearly basis. Create a new budget year on the **Home** page.

1. On the **Budgets** panel, click **Add record**.

Budgets

Budget Id	Year	Description	Management Unit	WO Template Id	WO Template Desc	WO Template Entity Type
<input type="checkbox"/>	1	2022	Parks Landscaping Budget	9F21	7571	Mowing
<input type="checkbox"/>	2	2022	Fire Hydrant Maintenance	SSZ	13004	Install New
<input type="checkbox"/>	3	2018	2018_Repair Emergency		12496	Repair Emergency

1-3 of 40

2. On the **Add New Budget Year** panel, complete the information for the new budget, including all required fields.
3. Click **Create Budget**.

Add New Budget Year

Year ***(Required)**: 2024

Description ***(Required)**: Repairs to electric meters

Group ***(Required)**: Electric

Type ***(Required)**: Electric Primary Meter

Management Units: [Dropdown]

Unit Description: [Dropdown]

Activity Code: [Dropdown]

Work Order Templates ***(Required)**: Repair Meter

Activity Program: [Dropdown]

Cancel **Create Budget**

4. On the **Budgets** panel, select the check box next to the new budget.
5. Click **View Details**.

Budgets

Budget Id	Year	Description	Management Unit	WO Template Id	WO Template Desc	WO Template Entity Type
<input type="checkbox"/>	41	2024	Copie Fire Hydrant Maintenance	SSZ	13004	Install New
<input checked="" type="checkbox"/>	42	2024	Repairs to electric meters		10077	Repair Meter

40-41 of 41

6. Add the information for the budget on the **Fiscal Activity** panel.

Fiscal Activities

Year: 2022

Description: Parks Landscaping Budget

Budget Id: 1

Group: Parks & Recreation

Type: Parks

Management Unit: Forestry - Zone 1

Unit Description: Large Mowing

Activity Program: Parks

Activity Code: [Dropdown]

7. Add the information for the budget on the **Cost** panel.
8. Click **Refresh WO Costs** to update any changes that may have been made from the work order template estimated costs.

Cost

Inventory: 25

Description Code: LINEAR FEET

Average Crew Size: 0

Daily Budget: 0

Yearly Budget: 0

Effort Level: 100

Description Code: LABOR HOURS

Crew Days: 312.5

Daily Labor: 0

Yearly Labor: 0

Work Quantity: 2,000

Description Code: HYDRANTS

Unit Cost: 0

Daily Material: 0

Yearly Material: 0

Average Daily Output: 8

Description Code: LABOR HOURS

Labor Hours / Day: 0

Daily Equipment: 0

Yearly Equipment: 0

Work Day Hours: 16

Applied Overhead Percentage: 100

Refresh WO Costs

9. Add the information for the budget on the **Work** panel.

Work

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total	Target
Percent	8	8	8	9	7	9	8	9	8	9	9	8	100	100
Crew Days	0	0	0	0	0	0	0	0	0	0	0	0	0	312.5
Labor Days	1	0	0	0	0	0	0	0	0	0	0	0	1	0

10. Click **Save** in the upper-right corner.