



# Budget Manager Troubleshooting Guide

## *What do you want to do?*

### **I can't add a budget.**

- You must be an administrator to perform this routine.
- Make sure that you highlight the Budget Manager folder  before selecting the Add Budget option.

### **I can't add an administrator.**

- You must be an administrator to perform this routine.
- Make sure that you highlight the Budget Manager folder  before selecting the Add Administrator option.
- The person that you are trying to add is already defined as a budget administrator or budget user.

### **I can't add a budget user.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the Budget folders before selecting the Add Budget User option.
- The person that you are trying to add is already defined as a budget administrator or budget user.

### **I can't rename a budget.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the Budget folders before selecting the Rename Budget option.

### **I can't remove a budget.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the Budget folders before selecting the Remove Budget option.

### **I can't load salary notes.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the Budget folders before selecting the Load Salary Notes option.
- Accounts are currently checked out or exported by any of the budget users or budget administrators for the selected Budget.

### **I can't lock a budget user.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the ***budget users*** before selecting the Lock Budget User option.
- All the user's budget codes are already locked.

### **I can't unlock a budget user.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the ***budget users*** before selecting the Unlock Budget User option.
- All the user's budget codes are already unlocked.

### **I can't remove a budget user.**

- You must be an administrator to perform this routine.

- Make sure that you highlight one of the ***budget folders*** and ***budget users or administrators*** before selecting the Remove Budget User option.
- The user has account codes that are checked out.


### **I can't refresh accounting data.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the budget folders before selecting the Refresh Accounting Data option.

### **I can't add a budget account.**


- You must be an administrator to perform this routine.
- Make sure that you highlight one of the budget folders and that you highlight **your name** as the administrator budget preparer before selecting the Add Budget Accounts option.
- All the accounts in Accounting Manager for that budget's Fund and Type are already in the budget.

### **I can't export a budget account.**


- If you are a budget administrator, make sure that you highlight **your name** as the administrator budget preparer before selecting the Export Budget Accounts option. You cannot export accounts if you select a user or administrator other than yourself.
- If you are a budget user, make sure that the account is not locked. An account is locked when a lock icon  precedes the account number. If the account is locked, notify the budget administrator.
- The account is already checked out by another user or administrator.
- The account is inactive.

### **I can't cancel a budget export.**


- If you are a budget administrator, make sure that you highlight **your name** as the administrator budget preparer before selecting the Cancel Budget Export option. You cannot cancel the budget export if you select a user or administrator other than yourself.

- If you are a budget user, make sure that the account is not locked. An account is locked when a lock icon  precedes the account number. If the account is locked, notify the budget administrator.
- The selected account was not exported.
- The account is already checked out by another user or administrator.
- The account is inactive.

### **I can't import a budget account.**


- If you are a budget administrator, make sure that you highlight **your name** as the administrator budget preparer before selecting the Import Budget Account option. You cannot import a budget account if you select a user or administrator other than yourself.
- If you are a budget user, make sure that the account is not locked. An account is locked when a lock icon  precedes the account number. If the account is locked, notify the budget administrator.
- The selected account was not exported by you.
- The account is already checked out by another user or administrator.

### **I can't update a budget account.**

- If you are a budget administrator, make sure that you highlight one of the accounts under **your name** as the administrator budget preparer before selecting the Update Budget Account option. You cannot update a budget account if you select a user or administrator other than yourself.
- If you are a budget user, make sure that the account is not locked. An account is locked when a lock icon  precedes the account number. If the account is locked, notify the budget administrator.
- The account is already checked out by another user or administrator.

### **I can't update a budget account category.**

- If you are a budget administrator, make sure that you highlight one of the accounts under **your name** as the administrator budget preparer before selecting the Update Budget Account option. You cannot update a budget account if you select a user or administrator other than yourself.

- If you are a budget user, make sure that the account is not locked. An account is locked when a lock icon  precedes the account number. If the account is locked, notify the budget administrator.
- The account is already checked out by another user or administrator.
- You must be an administrator to change the category.
- This option is only available when updating one individual budget account.

### **I can't remove a budget account.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the accounts under **your name** as the administrator budget preparer before selecting the Remove Budget Account option. You cannot remove a budget account if you select a user or administrator other than yourself.
- The account is already checked out by another user or administrator.

### **I can't split a budget account.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the accounts under **your name** as the administrator budget preparer before selecting the Split Budget Account option. You cannot split a budget account if you select a user or administrator other than yourself.
- The account has notes.
- The account has already been checked out by another user or administrator.


### **I can't lock a user account.**

- You must be an administrator to perform this routine.
- Make sure that you highlight an account(s) under one of the ***budget users*** before selecting the Lock User Account option. You cannot lock accounts on a budget administrator.
- The account is already checked out by the user whose account you are trying to lock.

## **I can't unlock a user account.**

- You must be an administrator to perform this routine.
- Make sure that you highlight an account(s) under one of the ***budget users*** before selecting the Unlock User Account option. You cannot lock accounts on a budget administrator.
- The account is already checked out by the user whose account you are trying to lock.

## **I can't add/update budget notes.**

- If you are a budget administrator, make sure that you highlight one of the accounts under **your name** as the administrator budget preparer before selecting the Budget Notes option. You cannot add/update budget notes if you select a user or administrator other than yourself.
- If you are a budget user, make sure that the account is not locked. An account is locked when a lock icon  precedes the account number. If the account is locked, notify the budget administrator.
- The account has already been checked out by another user or administrator.
- The account has been split. If you need to add budget notes for a split account, double click on the accounts folder and add/update notes under each individual budget account code.

## **I can't see account history.**

- Make sure that you highlight one of the account codes before selecting the Add Budget User option. You can only select one account at a time.

## **I can't load salary notes.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the budget folders before selecting the Load Salary Notes option.
- Notes were not generated in Negotiations Manager first. First move the salary information that was projected through Negotiations Manager into Budget Manager. After salaries are projected, the Budgetary Interface utility in Negotiations Manager must then be used to export the salary information. Once the salary information is exported, the salary notes can be loaded through Budget Manager.

- You cannot import notes from Negotiations on a split account. There is an error report that is generated which allows you to distribute the money manually among the split accounts.

### **I can't submit the final budget.**

- You must be an administrator to perform this routine.
- Make sure that you highlight one of the budget folders before selecting the Submit Final Budget option.