BDT Location

To access the Budget Development Tool:
1. Start Citrix
2. Click on your BDT icon

Contact Information

For BDT assistance, training, information on security and access to your department’s BDT:
Stephen de Salome’ (388-3809) Email: stephen.desalome@snoco.org or
Cynthia Scheil (388-3915) Email: cynthia.scheil@snoco.org
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Using Citrix

BDT will be accessed through Citrix for a more stable platform now that we have a larger number of users that are accessing the system from remote sites. Citrix basically works the same on a County-issued mobile computer that uses NetMotion, as it does on a County-issued or personal-at-home computer.

If you need help with getting Citrix setup on your computer, contact your department Network Administrator or the IT Help Desk at 425.388.3378. Once Citrix is setup, if you have any questions or issues, contact Cynthia (3915), Stephen (3809), or the IT Help Desk (3378).

Open BDT through a Citrix Connection

Click on the Windows Icon, then on Citrix Workspace.

Or start typing “Citrix” - whether or not you see the box. You will see the Citrix Workspace Application appear in the list. Click on that selection.

The following screen will open showing the Citrix StoreFront.

Click on the BDT icon and BDT will open as usual.
Close Citrix

Note: This multi-step exit may seem cumbersome, but it will protect you against Citrix having a problem getting back into the BDT next time.

1. To log off the Citrix Connection **expand** the **hidden icons** on the system tray (lower right corner of your computer screen).

   ![Show hidden icons](Image)

2. Locate the Citrix **icon** (looks like a blue circle). **Right click** on the icon and select **Connection Center**

   ![Connection Center](Image)

3. Select **Log Off** and then select **Yes** to log off.

   ![Connection Center](Image)

4. You have logged out successfully when the button is grayed out and no connections show, then click the **Close** button.

5. On the Citrix Storefront screen, click on the X in the upper right corner to close.
Refresh Apps in Citrix

If Citrix seems unresponsive when you click on your BDT icon, or if the icon is not showing, click on the gear icon (in the top, right corner) and pick [Refresh Apps] in the dropdown list.

Print or Export in Citrix

Note: While in the Citrix environment keep in mind that you are working outside of your “normal” working environment. In the Citrix environment you will only be able to print reports to PDF and export Excel extracts (to the S or O drive). Once the files are there you can open them. The Citrix environment doesn’t have other Office software.

To print a report, you will need to save your report as a pdf, then outside of Citrix you can open and print your pdf file. In your report, when you click on Print, choose Microsoft Print to PDF (from XX ######) in session # (the XX ###### will be your computer tag number).

When you click on OK, you will be able to choose where you want to save your file. You have access to your OneDrive, as well as your network drives.

To export a report, the steps are on page 31. The only difference in using the Citrix access to BDT, is that you cannot open the export while in BDT so you must save (to your S or O drive, for example). The Citrix connection does not have access to Office applications like Excel. Instead you will export to an Excel file and use Excel on your computer to open the file.
Opening BDT System Screens

**Note:** With the addition of going over the Internet and through Citrix, the network connection is most likely going to be slow enough that you will receive this message on the screen. If this message box appears, just click on [OK] to open the BDT.

When you enter the BDT, you will first see this screen. Your network user id will be auto filled into the User Login box. Click in the [ENTER] button to open the BDT.

**Note:** It is even more important this year to exit out of the BDT if you are leaving your desk for more than a couple of minutes. If you are going to be gone more than 30 minutes, exit BDT and use the multi-step exit of Citrix (detailed on page 4) so that you have a smooth entry into the programs when you return.
Main BDT Menu

**CLOSE BUTTON** is on all BDT data entry screens as a **box in the upper left corner showing an arrow pointing at a door.** Click this button to **close** an existing screen and move to the previous screen. Selecting this button from the Main Menu closes the BDT.

**DATA ENTRY SCREENS** are accessed by clicking on one of the six buttons toward the top of the Main Menu screen:

The **“Base Expenditures”** screen is used to explain current expenditure allocations.

The **“Base Revenues”** screen is used to update current revenue projections.

All changes in expenditures, new revenue and new position items and descriptions are entered through the **“Priority Packages”** selection.

The **“Department Narrative”, “Program Narrative”, and “Department Work Plan Summary”** sections have been “rolled over” from the 2022 BDT and can be updated from these buttons.

*Hint! To avoid possible system errors, always use the door/arrow button to leave a screen.*
**UPDATE TABLES FUNCTION:** Select the “Update Tables” button to create summary tables and process revenue, expenditure and position changes. You must run this process in order to view the most recent data in your screen views or reports.

IMPORTANT!! If you attempt to run the update tables function while revenue/expenditure screens or report views are open by you OR another user in your department, an error will occur, and the update function will need to be rerun. (No data will be lost, but your reports could show invalid information until the update function processes correctly.) The “Update Tables” screen gives directions on how to proceed if an error occurs.

If reports are left open or BDT menus are incorrectly closed by any user in your department, the “wait” flag may not reset correctly. Use the “Reset Database” button to reset the flag, then run the Update Tables function again.

The **SCREEN VIEWS** section includes buttons to view total expenditure and revenue budgets at the program level. These views provide a drill down to see if an object code has related priority packages. A single program can be printed from these screens; to print multiple programs, use the “Report Menu” selection.

The **Report Menu** contains a variety of reports and data extracts that are available to departments.

Because we are using Citrix to access the BDT again this year, access to important links are not available within the 2023 BDT.

You may access the 2022 Adopted BDT through G:\Finance\Budget\22bdt.accdb.

Finance web site link is [https://www.snohomishcountywa.gov/185/Finance](https://www.snohomishcountywa.gov/185/Finance).

Budget Division page link is [https://www.snohomishcountywa.gov/367/Budget-Division](https://www.snohomishcountywa.gov/367/Budget-Division).
Base Expenditures Detail

This screen is accessed from the “Base Expenditures” button on the Main Menu and is used to provide justification for your base budget amounts. Click on the “Explanation/ Description” field for each line. Select Shift & F2 to zoom to a larger data entry field.

Use the Find Program drop down box or directional buttons to move between programs.

The Salary (Object 1011) and Benefit (Object 2013) Expenditures are calculated automatically based on the position information extracted from Highline in late May. The dollar amounts for these two line items CANNOT be overridden or changed unless you change the position data through a priority package.

Other expenditures, including overhead charges, have been loaded as part of base expenditures as explained in the 2023 Budget Instructions. Justification for these base budget amounts may be in the Explanation field of the DAC.

Any increase/decrease to the base budget amounts must be submitted through a priority package. Any changes to positions must be included in a priority package and will be reviewed as an increase or decrease to the base budget.
Base (Current) Revenue Detail

This screen is accessed from the “Base Revenues” button on the Main Menu. Every Department MUST review and adjust base revenues. Your review of department revenue is more critical than ever in today’s economic conditions. Departments are responsible for all revenue elements in your budget submittals.

Use this screen to update and explain all your current revenue estimates, unless the revenues are new dollars generated specifically by a priority package. (Those dollars will be placed in the priority package.)

![Base Revenue Budget](image)

Use the Find Program drop down box or directional buttons to move between programs.

Select the DAC line item that you wish to update. Enter the total amount of revenues for 2023 into the 2023 Base Field. Please explain your request with an entry in the “Explanation” field. Select Shift & F2 to zoom the “Explanation” field larger.

Select the Print Program button to print the current program’s revenue report. This report only includes base revenues (new revenue items are not included here).
Priority Package Worksheet

Use the “Priority Package” button on the main menu to create and edit priority packages. The total BDT submission for each priority package (including text responding to the Description and Justification sections) is limited to no longer than three pages.

To open an existing package or move between existing packages, use the Find Package Name or Find Pkg # drop down box(es).

To add a new priority package, click the button at the top of the screen.

A Package Type Selection screen will pop up to allow you to choose the package type.

Select the Package Type from the drop down box. The type is STANDARD or CIP–CAPITAL. Use the CIP-Capital type to enter those costs that are to be capitalized. After you have chosen your package type, click on the “Use this Package Type” button to be returned to the Priority Package Worksheet form.

Hint!
[Shift] + [Enter] saves the current record. Switching records also saves the data, but it’s a good idea to save frequently, especially if you’re entering a lot of data.

Hint!
You cannot DELETE a Priority Package and its associated expenses.
If you need a package deleted call Stephen x3809 or Cynthia x3915
Your package type will appear at the bottom of the form. When CIP-Capital Package Type is chosen, a CIP Category section will appear also. (See **CIP Important Note** under Package Description)

If your department has chosen to use CIP categories, choose from the drop down list. In a CIP-Capital package, dollars are entered into the year it is anticipated they will be expended but only the dollars in the current budget year field are appropriated. All other costs should be entered using the STANDARD package type.

Type in a **unique Short Name** for each package. The short name is limited to 50 characters and cannot include the (+, # or %) character. Public Works and DCNR should use the fund number (i.e., 102, 415) as the first three characters of their name.

Fill in the **Package Description** (see CIP note below) and **Justification/Return of Investment Analysis** fields. The combined length of these fields should be limited to three pages. See the Budget Instructions for recommendations on what to enter and how to format these fields.

**CIP IMPORTANT NOTE:** The Package Description is what prints in the CIP book, not the Justification tab. Keep this in mind – whatever needs to print in the CIP book needs to be on the Package Description tab.

**SALARY POSITION WORKSHEET:** This button on the priority package data entry screen opens up detail screens to **Add Positions** or **Edit/Allocate Existing Positions** assigned to this priority package. (The process for editing and assigning positions to priority packages is explained in the SALARY POSITION WORKSHEET section of these instructions.) The expenditure accounts for Regular Salaries Object 1011 and Benefits Object 2013 are calculated based on the information...
pulled from Highline and/or edited in these Salary Position Worksheet screens. The calculations CANNOT be overridden; make changes to salaries and benefits through the Salary Position Worksheet.

**REVENUE/EXPENDITURE DETAIL:** Click the Expenditure or Revenue detail buttons.

**VIEW PACKAGE:** Click on the button to view the package. A summary of expenditure, revenue and FTE changes for the package.

*Suggestion!*
Select “View Package (no update)” to view a priority package’s text or current saved data. To view a new priority package or changes entered in an existing priority package for position, revenue or expenditures, you must run the “update tables” function from the main menu. To save time, you may want to wait until you’ve completed data entry for multiple packages before updating tables.
Salary Position Worksheet

The FTE information is based on data extracted from Highline, which is done late in May. Each department is responsible for insuring that their position data is accurate. Note that positions are budgeted at the approved position code level which may differ from the current assignment level. See the 2023 Budget Instructions for additional information on FTEs, salaries and benefits.

This screen opens when you click on the “Salary Position Worksheet” button on the Priority Package Screen. It shows a view of all the positions currently assigned to this priority package. If there are multiple programs within the package, select the buttons to scroll through the programs.

To add a new position, select the “Add New Position” button.

To edit a position or change the account distribution (DAC), click on the “Edit/View Positions/Allocation” button at the top of the screen.
Add New Position Worksheet

This worksheet is accessed from the “Add New Position” button on the Salary Position Worksheet screen and is used to add NEW POSITIONS ONLY.

NOTE: Once you’ve exited this screen, the position can no longer be viewed from this section. After you run the “Update Tables” function on the Main Menu, the newly created position will be included on the View Positions listing and can be edited in the “Edit/View Positions/Allocations” section of the Salary Position Worksheet.

Note: Controls will prevent this form from closing until all of the required fields are filled, and the DAC allocation equals 100%. A pop-up message will guide you if required fields are missing.

Note: Be sure to use the tab button to move from field to field within this form, to make sure that auto-populate fields have the opportunity to populate and that all fields are filled in.

Position Code - The REQUIRED 8-digit format for new positions is: NEW+ 2-digit department number + 2 digit department unique counter + “R” for Regular or “P” for Project (ex. NEW1201R).

The Employee Name defaults to “New Position” or you may type in a name. Select Job Title from the drop down box. The Job Scale for the position selected will fill in automatically.
Select the Bargaining Unit from the Unit drop down box. Select the retirement plan for the position from the drop down box.

Type in the FTE. (The FTE must be 1.0 or less).

Type in the Start and End date for this position. (If this is a project position, an End Date is required. Use 12/31/2023 rather than 1/1/2024)

Select the positions first, second and third step from the drop down boxes. New positions should start at Step 01. (If the position will be at step 01 for 12 months, it is not necessary to fill in the second and third step.) Fill in the number of months the position will be at each step in 2023. The monthly and annual salary and annual benefits will calculate automatically.

Provide detailed justification for adding this position in the Comments field. Include in your description a summary of what changes you are making and why. This field is used in budget decision making throughout the budget phases.

Next, go to the Position Account Distribution section at the bottom of the screen, and select the Account Program(s) that will fund this position from the drop down box. Enter the percentage of the position that is to be allocated to this program.

New positions are automatically assigned to the priority package they are created in.

The position can be allocated to as many programs as you wish, as long as the total allocation equals 100%.

**Hint!**  
If you have allocated 100% of the position to your Program DACs and still get a “DAC Missing” error message when you exit this screen, it’s because an empty row has been activated. Click on a row that has a valid DAC and you’ll be able to close the screen.
Edit/Allocate Positions Worksheet

This screen is accessed by selecting the “Edit/View Positions/Allocation” button from the Priority Package Salary Position Worksheet. Use this screen to UPDATE existing positions. When positions are added or changed, the revision will show here after the “Update Tables” function is run from the Main Menu.

Positions on this screen are sorted by position number. To find a specific employee or position title, use one of the drop down selection boxes.

Note: Positions that have not previously been added to a package or are already in the package that is open will show here. Notice the column on the far right side shows the Package ID. N/A or blank will show for positions not previously entered into a package. Notice at the bottom of the screen example here the vacant position is in PID 51, which is the package that is open (as shown at the top of the screen). Positions that have previously been entered in another package will not show here – you must go to that package to edit.

To change or edit a position, DAC and priority package assignment click on the Position Title of the employee you wish to change to open the detail edit screen.

If you only need to allocate positions to a specific program (DAC) or assign a priority package to a position, click on the Position Code of the employee to open the detail distribution screen.
Position Distribution Worksheet

This screen is accessed by double-clicking on the **Position Code** of the position you wish to change on the “Edit Positions and DAC Assignments” screen. Use this screen to allocate position costs to priority packages and to account codes. The upper box (2023 Base Position DACs) shows the original DAC assignment for the position and does not change.

**To Change a DAC or the allocated percent of a DAC,** go to the 2023 Budget-DAC Changes section, and overwrite the percentage amount to be allocated to the existing DAC (change the allocation to 0% if moving entire position allocation to a new DAC).

Select the **Program(s)** that will fund this position from the drop down box labeled “Select Distribution Code”. Next, enter the **percentage** of the position that is to be allocated to this program.

A position can be allocated to as many programs as you wish, so long as the total allocation equals 100%.

Click on a row that has a valid DAC & Priority Package to exit without error message!
Edit Existing Position Worksheet

This update screen is accessed by clicking on the **Position Title Field** in the Position Listing screen. The data on the left side of the screen is the original position information/DAC and will not change. Make proposed position and DAC changes to the fields on the right side of the form.

**Note:** Controls have been added that will prevent this form from closing until all of the required fields are filled, and the DAC allocation equals 100%. **When editing a position in this screen, an entry must be made to EVERY field – use the tab key to move through all fields.** Using the tab key to move through all fields will make sure that auto-populate fields have the opportunity to populate and that all fields are filled in.

A pop-up message will guide you if required fields are missing. Also new is the automatic populating of fields (Last, First Name, Retirement Plan, FTE, and Start Date) in the Position Updates (right side of the form).

A newer feature introduced in Version 2.18 is the **Undo DACs** button, which can be used to undo all DAC changes/additions and reset to the base loaded DACs.

The change reason must be clearly identified in the **Comments** box. Include in your description a summary of what changes you are making and why. This field is used in budget decision making throughout the budget phases. There is a minimum number of characters required in this field.
Select the **Job Title** from the drop-down box. The **Job Scale** for the position will fill in automatically.

Select the **Unit Code** and **Retirement Plan** from the drop-down boxes.

Type in the **FTE**. *(The FTE must be 1.0 or less).* If the position is to be deleted on 12/31/22 or prior to 1/1/2023 enter the FTE as 0. If the FTE will end during 2023, enter the total FTE amount here, but enter the number of months the FTE will be funded in the Months column, and fully explain the change in the Comments section.

Enter the position **start** and **end** dates. *(An end date is required for a project position and a message will prompt you if it is missing when you try to close this screen.)* Use 12/31/2023 instead of 1/1/2024.

Select the positions’ first, second and third **Step** from the drop-down boxes. Fill in the **# Months** field the position will be at each step in 2023. *(If the position will be at step 01 for 12 months, you do not need to fill in the second and third step.)* The monthly and annual salary and benefits will calculate automatically. Contact your budget analyst if the position has unique benefit requirements that may make it necessary for the benefits to be adjusted.

**Salary (Object 1011) and Benefit (Object 2013)** are calculated automatically based on the information entered in the Position Detail section. These amounts are distributed to priority packages and programs based on the information entered in the 2023 Budget – DAC Changes section.

**To Change a DAC or the allocated percent of a DAC**, go to the 2023 Budget-DAC Changes section, and overwrite the **Allocated %** to be allocated to the existing DAC (enter 0% if moving entire position allocation to a new DAC).

Click on the dropdown arrow for **Select Distribution Code**, select the program(s) that will fund this position, then enter the **Allocated %** for this DAC.

A position can be allocated to as many programs as you wish, so long as the total allocation equals 100%.

The **Undo DACs** button can be used to undo all DAC changes/additions and reset to the base loaded DACs. If you add and make changes to the DACs in a package, and then decide you want to leave the DACs and allocations as it was originally, click on the Undo DACs button.
Expenditure Data Entry

This screen is accessed from the “Expenditure Data Entry” button on the Standard Priority Package worksheet screen. This screen is used for data entry of non-salary non-preloaded overhead changes only.

The Salary (Object 1011) and Benefit (Object 2013) Expenditures are calculated automatically based on the information entered in the Add Position or Edit/Allocation Position sections of the BDT. The dollar amounts for these two line items CANNOT be overridden or changed unless you change the position data, therefore those two line items are not available from the detail object drop-down box or shown on this data entry screen.

Preloaded overhead charges are part of base expenditures and have been assigned to specific programs. These line items cannot be changed and are not available from the detail object drop down box. Contact your budget analyst about changing the program distribution for preloaded line items.

Other expenditures have been loaded as part of base expenditures as explained in the 2023 Budget Instructions. Use this screen to show INCREASES or DECREASES to the base budget. A priority package can include multiple program and fund accounts. Contact your budget analyst for instructions on preparing packages that affect multiple departments.

Click on the Find Program drop down box to find the appropriate program code. This will bring a list of all your department’s programs for this package.

Next click on the Find Detail Object # drop down box. This will bring up a listing of all active Cayenta Distribution Account Codes associated with the program code. Please utilize the existing DAC structure as much as possible.

Hint! Scroll up to see previously entered line items.

Whole dollar entries please!

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If you are requesting a new program or account code (that does not currently exist in Cayenta) start the process to create a new DAC by sending an e-mail request to SBF-DACS (copy your budget analyst). Be aware it can take several days to review and create account codes in Cayenta; you may need to use existing DACs in your budget submittal and adjust the DACs later.

Once you’ve selected the distribution code, type in the amount to be charged to that line item in the “Request” field and enter detail information into the “Explanation” field. Your entry should be WHOLE dollars – NO PENNIES!

To change a distribution code (DAC) for a line that was entered previously, place your cursor on a field in the line to be changed, and then select the new program/account code using the **Find Program** and **Find Detail Object** drop down box. The new account information will overwrite the existing record’s distribution code. When entering a NEW line, be sure the cursor is on a blank line (marked with an asterisk).

**Hint!**

To prevent an accidental overwrite of existing data, the “Expenditures” screen automatically defaults to a new row at the bottom of your previous data entry. If previously entered line items appear to have disappeared, move the right hand scroll bar in the “Expenditures” area to the top of the section.
Revenue Data Entry

This screen is accessed from the “Revenue Data Entry” button on the Standard Priority Package worksheet screen.

Revenues NOT in Base: Revenue for priority packages will only be entered for NEW revenue derived from this priority package. All other revenue is entered on the (Current) Base Revenues Form.

Enter revenue items at the distribution code object level for each item related to this priority package. Use the same drop down box procedure outlined for obtaining expenditure lines, and then enter the amount and detailed description information in the appropriate fields.
CIP Capital Data Entry

This screen is accessed from the “CIP Rev/Exp Detail” button on the CIP-Capital Priority Package Worksheet Primary Screen. Note: You can only enter this screen if CIP-Capital package type is selected in the package type pop-up when the package is created.

The screen is used for requesting non-salary line items only. If the Salary (Object 1011) and Benefit (Object 2013) Expenditures are an allowable Capital expense, these amounts will be calculated automatically based on the information entered in the Add Position or Edit/Allocation Position sections of the Priority Package. The dollar amounts for these two line items CANNOT be overridden or changed unless you change the position data, therefore those two line items are not shown on this screen. Salary and benefit dollars assigned to this package will be added to the current year (2023) column.

At the Other Capital section, click on the Find Program drop down box to find the appropriate program code. Next click on the Find Detail Object # drop down box. This will bring up a listing of all active Cayenta Distribution Account Codes associated with the program code. To change an existing line item account code, place your cursor on a field in the line to be changed, and then select the new program/account code using the Find Program and Find Detail Object drop down boxes. The new account information will overwrite the existing record’s account code. To add a new line, place cursor on a blank line, and then select the program/account code.
If you are requesting a new program or account code (that does not currently exist in Cayenta) start the process to create a new DAC by sending an e-mail request to SBF_DACS (please copy your budget analyst in the “CC” line). Be aware that it can take several days to review and create account codes in Cayenta; you may need to use existing DACs in your budget submittal and make adjustments later.

Type in the request (year 2023) and projected amounts for the next five years. Include only amounts that are capitalized in this section. Multiple program accounts can be included in one priority package. Follow the same process for each capital detail object item.

At the **Funding Source** section, select the appropriate funding source category from the drop-down box, and type in the dollar amounts for the appropriate years. Follow the same process for each funding source category. **Total Capital and Funding Source Amounts for each year must be equal.** This funding source section is informational only for inclusion in the printed Capital Improvement Plan and will not affect the amount appropriated as a Base Revenue. If the CIP Priority Package includes New Revenue or any changes in the Base Revenue, use the Main Menu, Base Revenue button to record the changes and enter an explanation in that screen.
Department Narrative

This screen is accessed from the “Department Narrative” button on the Main Menu. Data was copied over from the prior year for this section.

The mission of the Finance Department is to provide protection and stewardship of Snohomish County’s financial resources, to provide financial leadership and quality information to the staff, citizens, and communities of the County in compliance with legal requirements and policies. Through our diverse activities and duties, we are committed to reach out to County departments and other governmental agencies to cooperate in fulfilling their missions.

Then select the appropriate tab to update the Mission Statement, Legislative Authority, and Outcomes Generated sections.
Program Narrative

This screen is accessed from the “Program Narrative” button on the Main Menu. Use the Find Program drop down box or the selection arrows to locate the program account.

Data was copied over from the prior year for this section. Update the Staff Contact and Program Description fields as necessary.
SCREEN VIEWS
Expenditure Viewer

From the Main Menu, under the "Screen Views" section, click on the “Expenditure” button to see your total budget request: ALL expenditure dollars are summarized by program in this view. Run the “Update Tables” function prior to opening this screen to be certain that you are viewing the most recent data.

Click on the 2023 Budget dollar amount of a particular DAC line item to drill down to a listing of all associated priority packages.
Revenue Viewer

From the Main Menu, under the "Screen Views" section, click on the “Revenue” button to see your total budget request: Base revenue and priority package amounts are summarized by program in this view. Run the “Update tables” function prior to opening this screen to be certain that you are viewing the most recent data.

If there were revenues added to the account code through a priority package, an asterisk will show up after the dollar amount. Click on the asterisk to drill down to a listing of all associated priority packages for that DAC account.
View Positions/DAC Assignments

From the Main Menu, under the "Screen Views" section, click on the “View Positions DAC Assignments” button to view the allocation of salary and benefit costs to the appropriate programs. All changes to position data are entered through a priority package – see instructions under Salary Position Worksheets. Run the “Update Tables” function prior to opening this screen to be certain that you are viewing the most recent data.

Click on the position title to view a position’s detail, priority package assignment and distribution codes.

Note: Notice the column on the far-right side shows the Package ID. A blank or 0 will show for positions not previously entered into a package. Positions that have previously been added to a package will show that package number. All positions will show here whether or not they have been added to priority packages.

Double-click on the PID number in the far-right column to view the package the position is attached to.
**Report Menus**

This screen is accessed from the “Report Menu” button on the Main Menu. Run the “Update Tables” function prior to opening this screen to be certain that you are viewing the most recent data. The “Update Tables” function will not operate correctly while this menu or any reports are open.

These detail reports are available by clicking the listed buttons. The red-lettered buttons are the most requested reports. Reports will open in “Print Preview” format. To print a hard copy of the report, use the “print” button at the top of the screen or right-click on the report and select the print option.

*Hint!*
Click on the “More Reports” button to find revenue, expenditure and position data formatted for export to Excel.
This screen is accessed from the “More Reports” button on the Report Menu screen. As labeled, some of these reports can be exported to Excel.

The Positions by Account Code Data is one that most departments will want to look at.

There are two ways to export to Excel. Click on the report button, then:

Click on the upper left corner of the spreadsheet, right click and Copy. Open an Excel spreadsheet and Paste.

Or click on External Data menu, Excel (Export), Browse and choose the S: drive folder and file name that you want to save to, click “Save”, click on “Export data with formatting and layout”, click “OK”, then Click “Close”, click on the X in the upper-right-hand corner to close the export report. You will find your export in the folder that you saved to.
# TROUBLESHOOTING

<table>
<thead>
<tr>
<th>PROBLEM</th>
<th>EXPLANATION/SOLUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>“#deleted” or “tried to lock table” message</td>
<td>You are trying to open a report while someone else in your department is running the table update function. Press close or escape and log out of the database. Try again later.</td>
</tr>
<tr>
<td>I updated a priority package and the data isn’t showing on my report.</td>
<td>Run the “Update Tables” function. Data entry will not show on reports or screen views until the “Update Tables” function is run.</td>
</tr>
<tr>
<td>I received an error message when I tried to Update Tables.</td>
<td>IMPORTANT!! If you attempt to run the update tables function while revenue/expenditure screens or report views are open by you OR another user in your department, an error will occur, and the update function will need to be rerun. (No data will be lost, but your reports could show invalid information until the update function processes correctly.) The “update tables” screen gives directions on how to proceed if an error occurs.</td>
</tr>
<tr>
<td>“Wait Reports are in use” message appears, and no one in my department has reports or screen views open.</td>
<td>You or another user may have left a screen or report open and BDT shut down incorrectly. Run “Reset” process and reopen BDT. (ALWAYS close all reports and screens when you are through using them.)</td>
</tr>
<tr>
<td>My priority package short name doesn’t show in the drop-down box.</td>
<td>You may have included command keys (+ # or %) in your title. Contact Stephen or Cynthia.</td>
</tr>
<tr>
<td>I added a new position in a priority package and now I can’t find it.</td>
<td>Go to Main menu. Run “Update Tables”. Your new position should now show up and can be edited by clicking on the position title in the Edit/View Positions/Allocations Salary Position Worksheet.</td>
</tr>
<tr>
<td>I entered several DACs into a priority package and now they’ve disappeared.</td>
<td>Click on the right-hand scroll bar in the area where the DACs were entered and slide up to the top of that section.</td>
</tr>
<tr>
<td>Can’t see all data in field.</td>
<td>Press SHIFT F2 to view the Zoom screen.</td>
</tr>
<tr>
<td>PROBLEM</td>
<td>EXPLANATION/SOLUTION</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>I lost all the data I was entering into my priority package.</td>
<td>It is not possible to recover data if the record has not been saved. Data entered into a field is automatically saved when you move to the next field. However, when entering large amounts of data, it is a good idea to save frequently. Use [Shift] + [Enter] to save your entry and continue typing in that field. For large amounts of data entry, we recommend using Word, then copying and pasting data into the appropriate BDT field when entry is complete. Press SHIFT F2 to view the Zoom screen.</td>
</tr>
<tr>
<td>Spell-check [F7] is checking all my priority packages.</td>
<td>To check a specific section, highlight that section before selecting [F7].</td>
</tr>
<tr>
<td>I chose the wrong priority package type</td>
<td>You can’t change the type once you have selected it, but you can call us, and we will work “behind the scene” in the program to get your package fixed.</td>
</tr>
</tbody>
</table>

Problems with Citrix

<table>
<thead>
<tr>
<th>PROBLEM</th>
<th>EXPLANATION/SOLUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>I click on the BDT icon in Citrix, but BDT does not open</td>
<td>In the upper right corner, find the gear and click on the drop-down arrow next to it. Choose Refresh Apps. Click on BDT icon again.</td>
</tr>
<tr>
<td>I am still having trouble getting into the BDT after I did the above.</td>
<td>Log out of Citrix and close it. Go back into Citrix and try again. If problem persists, close all programs and re-boot.</td>
</tr>
<tr>
<td>I tried all the above and I still can’t get into the BDT.</td>
<td>Contact Cynthia or Stephen or the IT Help Desk.</td>
</tr>
</tbody>
</table>