Add new accounts to budget

Learn how to create new accounts and adjust the budget in Amlib.

Ensure the BudgetModify is available and Button Security is set

1. Launch the Amlib client
2. Go to Main > Supervisor > UserNames – the User Names table will display
3. Highlight the User Name you would like to grant a permission to (for example: STAFF) and click the F8 Choose button – the User Security screen will display
4. Go to Viewing Menu, Modify Budget.
5. Click any Red Buttons (for example, Insert Button) to make it Green.
6. Exit out of Amlib and log back into Amlib to refresh the privileges
Create New Accounts

1. Go to Main > Finance > Budgets – the Budgets Total table will display
2. From the Funds Menu select Accounts
3. The Fund Accounts and GL Codes window will display

4. Add new accounts as required, by selecting F1 New and enter the details of the new Account as required
5. Select F3 Save

Adjust the budget

1. Go to Main > Finance > Budgets – the Budgets Total table will display
2. From the Budget Totals Window, highlight the Budget you wish to change and press F2 Modify
3. A message will display: Add Accounts to the current budget?

4. If Yes is chosen, a list of defined (but unused) Accounts will display and the required Account can be chosen.

5. Highlight the Account to add, and select OK.

6. The chosen Account will be then placed in the Budget Listing (Note: A Budget Amount can be allocated if required).

https://help.oclc.org/Library_Management/Amlib/Finance_and_orders/Add_new_accounts_to_budget

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7. This Account can now be used for Orders and Invoices in the current Budget.