

Budget Entries in Skyward

Building the Workfile

ESCAMBIA CO. SCHOOL DISTRICT - PRODUCTION

Melissa Weekley Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

1. Click on the **Account Management** Tab.

2. Click the **Budget Entry** link.

Account Management Setup

Account Master Setup

- Account Profile
- Chart of Accounts
- Account Summary Templates
- Operating Statement Accounts
- Balance Sheet Accounts

Budget Management Setup

- Budget Entry
- Add Budget

Project/Grant Management

General Inputs Setup

Check Estimator Edit

Unsubmitted

ESCAMBIA CO. SCHOOL DISTRICT - PRODUCTION

Melissa Weekley Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

Budget Entry

Views: General Filters: *Budgets I Have Access To

3. The Filters option should be set to **Budgets I Have Access To**.

Budget Process Description	Fiscal Year	Budget Type	Create By	Sts	Last Edited By
▶ 4001-LOCAL PROJECTS	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4001-SUPERINTENDENT	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4002-SCHOOL BOARD	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4003-SCHOOL BOARD ATTORNEY				V	
▶ 4010-SCH VOLUNTEERS & BUS PAR				V	
▶ 4011-SCH CHOICE, TRANS & SPC PR				V	
▶ 4014-AFFIRMATIVE ACTION/RECRU				V	
▶ 4101-LOCAL PROJECTS	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4101-OPERATIONS	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4103-COMMUNICATION SERVICES	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4104-CUSTODIAL SERVICES	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4104-LOCAL PROJECTS	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4105-LOCAL PROJECTS	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4105-MAINTENANCE SERVICES	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4108-TRANSPORTATION SERVICES	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4109-FACILITIES PLANNING	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4109-LOCAL PROJECTS	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4110-SURPLUS INVENTORY	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4124-ENERGY MANAGEMENT	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4125-LOCAL PROJECTS	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4125-PROTECTION SERVICES	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	
▶ 4201-FINANCE & BUSINESS SVCS	2019 - 2020	LVL DIR/TI	WEEKLMEL000	V	

4. Select the applicable department cost center to highlight the budget process. (Created by should be WEEKLMEL000).

5. Click the **Clone** button.

200 114 records displayed Budget Process Description: ABC



- Process Information
- Parameters
- Breaks
- Account Ranges
- Field Selection

Process Information

* Description: 4203-BUDGETING

* Budget Year to Process: 2019-2020: July 1, 2019 - June 30, 2020

Do not allow access to other users (No Access)
 Allow other users to view this budget (Read Only)
 Allow other users to view/modify this budget (Modify)
 Allow other users to view/modify/generate this budget (Generate/Modify)

Create Clone Back

Note: Make sure "Do not allow access to other users" is marked.

6. Click the Create Clone button.

Restrict Budget Entry Users and Accounts ?

Budget Entry User Selection

Name Key	Last Name	First	Middle	Account Groups
There are no records to display; check your filter settings.				

Add Delete



- Process Information
- Parameters
- Breaks
- Account Ranges
- Field Selection

Process Information

* Description: 4203-BUDGETING.

* Budget Year to Process: 2019-2020: July 1, 2019 - June 30, 2020

Do not allow access to other users (No Access)
 Allow other users to view this budget (Read Only)
 Allow other users to view/modify this budget (Modify)
 Allow other users to view/modify/generate this budget (Generate/Modify)

Create Clone Back

7. Click the back arrow.

Restrict Budget Entry Users and Accounts ?

Budget Entry User Selection

Name Key	Last Name	First	Middle	Account Groups
There are no records to display; check your filter settings.				

0 records displayed

Add Delete

ESCAMBIA CO. SCHOOL DISTRICT - PRODUCTION

Melissa Weekley Account Preferences Exit ?

Home Account Management Vendors Purchasing Accounts Payable Accounts Receivable Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

Budget Entry ☆

Views: General Filters: *Budgets Created by Me

Budget Process Description	Fiscal Year	Budget Type	Created by	V/M	Users	Sts	Last Edited By
4203-BUDGETING	2019 - 2020	LVL DIR/ TI	WEEKLMEL000	V			
4204-ACCOUNTING OPERATIONS	2019 - 2020	LVL DIR/ TI	WEEKLMEL000	V			
4204-LOCAL PROJECTS	2019 - 2020	LVL DIR/ TI	WEEKLMEL000	V			
4205-INVENTORY SYSTEMS	2019 - 2020	LVL DIR/ TI	WEEKLMEL000				
4207-LOCAL PROJECTS	2019 - 2020	LVL DIR/ TI	WEEKLMEL000				
4207-PURCHASING & BUSINESS SVC	2019 - 2020	LVL DIR/ TI	WEEKLMEL000				
4208-INFORMATION TECHNOLOGY	2019 - 2020	LVL DIR/ TI	WEEKLMEL000	V			
4208-LOCAL PROJECTS	2019 - 2020	LVL DIR/ TI	WEEKLMEL000	V			

Buttons: Add, Edit, Delete, Clone, Individual Budget Entry, Mass Change, Import Detail

8. Change the Filters option to Budgets Created by Me.

9. Click the Individual Budget Entry button.

Budgetary Entry Processing

Budgetary Entry for 4203-BUDGETING

Processing Messages

There currently are no existing temporary workfile records for this Budget Process record. Running the process will create them. After creating the temporary workfile records you will be able to review, update and, if you choose, submit the new budgetary values.

Build New Workfile

Processing Parameters

Target Budget Type: LVL DIR/ TI Budget Entry Format: Whole Dollars

Fiscal Year: 2019-2020

10. Click the Build New Workfile button.

Budgetary Entry Processing

Budgetary Entry for 4203-BUDGETING

Processing Messages

Processing.

Process Title: Processing Account Numbers.

Process Description: Filter Accounts.

Current Key: ACCOUNT NUMBER: 1110E7300 0240 0491 07270 00000 00000

Processing Parameters

Target Budget Type: LVL DIR/ TI Budget Entry Format: Whole Dollars

Fiscal Year: 2019-2020

Skyward will begin building the workfile. It is normal for this process to take a few minutes.

Budget Entry

After the workfile has been created, the budget entry screen will be displayed. All of the accounts that the school/department has access to enter budget for will be available. There are two options for entering budget into Skyward.

Option 1: A general dollar amount can be entered into the 2019-2020 LVL DIR/TI column.

Budgetary Entries

Processing Parameters
 Budget Process Description: 4203-BUDGETING Budget Type: LVL DIR/TI Fiscal Year: 2019-2020

Budgeted Amount For Selected Accounts
 Total 2019-2020 LVL DIR/ TI: 1,350.00 [Submit Budgetary Entries](#)

*Individual Accounts with Detail Budget Lines attached are disabled from being modified at the account level.
 **Account data as of 02/01/19. Refresh Account Details

Views: General Filters: *Skyward Default

Account Number	IA	BD	2019-2020 LVL DIR/ TI	2018-2019		
▶ 1110E7500 0310 4203 01000 00000 00000			1350			
▶ 1110E7500 0369 4203 01000 00000 00000			0			
▶ 1110E7500 0391 4203 01000 00000 00000			0	0.00	1110	E
▶ 1110E7500 0510 4203 01000 00000 00000			0	6,600.00	1110	E
▶ 1110E7500 0519 4203 01000 00000 00000			0	0.00	1110	E
▶ 1110E7500 0642 4203 01000 00000 00000			0	0.00	1110	E
▶ 1110E7500 0644 4203 01000 00000 00000			0	0.00	1110	E
▶ 1110E7500 0649 4203 01000 00000 00000			0	0.00	1110	F

Option 2: Detailed budget amounts can be entered for specific items that comprise the overall budget amount being requested for that account.

Budgetary Entries

Processing Parameters
 Budget Process Description: 4203-BUDGETING Budget Type: LVL DIR/TI Fiscal Year: 2019-2020

Budgeted Amount For Selected Accounts
 Total 2019-2020 LVL DIR/ TI: 0.00 [Submit Budgetary Entries](#)

*Individual Accounts with Detail Budget Lines attached are disabled from being modified at the account level.

CHANGES HAVE NOT BEEN SUBMITTED

1. Click the arrow buttons to expand the line information.

2. Click the Add/Edit Detail Budget Items link.

Expand All Collapse All View Printable Details

Detail Budget Items Add / Edit Detail Budget Items

No Budget Details available for this account and fiscal year

Fund T Func Obj Fac Proj Subpr Prog	IA	BD	2019-2020 LVL DIR/ TI	2018-2019 Original Budget	Submitted	Fund	Type
▶ 1110E7500 0310 4203 01000 00000 00000			0	0.00		1110	E
▶ 1110E7500 0369 4203 01000 00000 00000			0	0.00		1110	E
▶ 1110E7500 0391 4203 01000 00000 00000			0	0.00		1110	E
▶ 1110E7500 0510 4203 01000 00000 00000			0	6,600.00		1110	E
▶ 1110E7500 0519 4203 01000 00000 00000			0	0.00		1110	E

2000 15 records displayed Account:

Detail Budget Items



Budget Account Information

Account Number:
Budget Type:
Fiscal Year:
Total Amount:

Views: Filters:



Add

3. Click the **Add** button.

Edit

Delete

Clone

Move Up

Move Down

Back

Line Nbr ▲	Description	Amount
<i>There are no records to display; check your filter settings.</i>		

Detail Maintenance



Detail Budget Item Maintenance

Line Number:

* Description:

4. Enter the budget item description and the amount. Then, click the **Save** button.

Maximum characters: 256, Remaining characters: 228

* Amount:

Save

Back

Detail Budget Items

Budget Account Information

Account Number: 1110E7500 0310 4203 01000 00000 00
 Budget Type: LVL DIR/TI
 Fiscal Year: 2019-2020
 Total Amount: 1,350.00

Views: General Filters: *Skyward Default

Line Nbr	Description	Amount
1	Description of Budgeted Item	500
2	2nd Budgeted Item	500
3	3rd Budgeted Item	250
4	4th Budgeted Item	100

Buttons: Add, Edit, Delete, Clone, Move Up, Move Down, Back

5. Add as many detail description lines as needed.

Click the **Back** button when all of the description lines have been entered.

Note: A combination of general and detail budget entry can be used in the workfile.

Budgetary Entries

Processing Parameters
 Budget Process Description: 4203-BUDGETING Budget Type: LVL DIR/TI Fiscal

Budgeted Amount For Selected Accounts
 Total 2019-2020 LVL DIR/TI: 10,100.00

Submit Budgetary Entries

Once the budget amounts have been entered, click the **Submit Budgetary Entries** button.

*Individual Accounts with Detail Budget Lines attached are disabled from being modified at the account level.
 Account data as of 02/01/19. Refresh Account Details **CHANGES HAVE NOT BEEN SUBMITTED

Views: General Filters: *Skyward Default

Account Number	Fund T	Func	Obj	Fac	Proj	Subpr	Prog	IA	BD	2019-2020 LVL DIR/TI	2018-2019 Original Budget	Submitted	Fund	Type
▶ 1110E7500	0310	4203	01000	00000	00000				Y	1,350	0.00		1110	E
▶ 1110E7500	0369	4203	01000	00000	00000					0	0.00		1110	E
▶ 1110E7500	0391	4203	01000	00000	00000					0	0.00		1110	E
▶ 1110E7500	0510	4203	01000	00000	00000					5000	6,600.00		1110	E
▶ 1110E7500	0519	4203	01000	00000	00000					500	0.00		1110	E
▶ 1110E7500	0642	4203	01000	00000	00000					0	0.00		1110	E
▶ 1110E7500	0644	4203	01000	00000	00000					0	0.00		1110	E
▶ 1110E7500	0649	4203	01000	00000	00000					750	0.00		1110	E
▶ 1110E7500	0692	4203	01000	00000	00000					0	0.00		1110	E

2000 15 records displayed Account:

Break Totals

Account Number	2019-2020 LVL DIR/TI	2018 - 2019 Original Budget
01000	7,600.00	7,600.00
01100	2,500.00	2,500.00

Buttons: Notes, Attach, Save & Continue Later, Insert New Account, Enter Different Account Breaks, View Break Total Details

Budgetary Entry for 4203-BUDGETING

Processing Messages

Starting the Run Update Process

Processing . . .

Back

Processing Status

Process Title: Budgetary Entry Processing

Process Description: Updating Records...

Current Key:

Skyward will begin processing the workfile. It is normal for this process to take a few minutes.

Budgetary Entry for 4203-BUDGETING

Process Options

View Report

Update Complete - Press to Close

At the end of budget entry process, there will be an option to view/print a report with budget amounts that were input into Skyward.

Once you are ready to close the screen, please use the **Update Complete-Press to Close**