

Budget Entries in Skyward

Building the Workfile

ESCAMBIA CO. SCHOOL DISTRICT - PRODUCTION

Melissa Weekley Account Preferences Exit ?

Home Account Management Fixed Assets Inventory SBAA Custom Reports Federal/State Reporting Administration

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

Account Management Setup

Account Master Setup

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

Account Management Reporti...

Budget Management Setup

- Budget Entry
- Add Budget
- Requisitions
- General Inputs

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

Project/Grant Management

Check Estimator

Unsubmitted

Edit

ESCAMBIA CO. SCHOOL DISTRICT - PRODUCTION

Victoria Perkins Account Preferences Exit ?

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

Budget Entry

Views: General Filters: Budgets I Have Access To Quick Filter (57)

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


Budget Process Description	Fiscal Year	LVL DIR/TI	PERKIVIC000	V/M*	User
4001-LOCAL PROJECTS	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4001-SUPERINTENDENT	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4002-SCHOOL BOARD	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4003-SCHOOL BOARD ATTORNEY	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4010-SCH VOLUNTEERS & BUS PARTN					
4011-SCH CHOICE, TRANS & SPC PRJ					
4014-AFFIRMATIVE ACTION/RECRUITM					
4014-LOCAL PROJECTS					
4101-LOCAL PROJECTS					
4101-OPERATIONS	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4103-COMMUNICATIONS	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4104-CUSTODIAL SERVICES	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4104-LOCAL PROJECTS	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4105-LOCAL PROJECTS	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4105-MAINTENANCE	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4108-TRANSPORTATION	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4109-FACILITIES PLANNING	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4109-LOCAL PROJECTS	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4110-SURPLUS INVENTORY	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4124-ENERGY MANAGEMENT	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4125-LOCAL PROJECTS	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4125-PROTECTION SERVICES	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4201-FINANCE & BUSINESS SVCS	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4201-LOCAL PROJECTS	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4202-AUDITING	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	
4203-BUDGETING	2025 - 2026	LVL DIR/TI	PERKIVIC000	V	

4. Select the applicable department cost center to highlight the budget process. (Created by should be **PERKIVIC000**).

5. Click the **Clone** button.

200 65 records displayed

Budget Process Description: ABC



Budget Entry

Process Information

* Description:

* Budget Year to Process:

☒ 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)

☐ 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.				

Create Clone

Back


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

6. Click the Create Clone button.



ESCAMBIA CO. SCHOOL DISTRICT - PRODUCTION

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



Budget Entry

Process Information

* Description:

* Budget Year to Process:

☒ 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)

☐ 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.				

Create Clone

Back

7. Click the back arrow.



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

Budget Entry

Views: General Filters: Budgets Created by Me Quick Filter

Budget Process Description* Fiscal Year* Budget Type* PERKIVIC000

4203-BUDGETING 2025 - 2026 LVL DIR/TT

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

9. Click the **Individual Budget Entry** button.

Individual Budget Entry View Workfile Delete Workfile

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

10. Click the **Build New Workfile** button.

Processing Parameters

Target Budget Type: LVL DIR/TT

Budget Entry Format: Whole Dollars

Fiscal Year: 2025-2026

Budgetary Entry Processing

Budgetary Entry for 4203-BUDGETING

Processing Messages

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

Processing...

Process Title: Processing Account Numbers.

Process Description: Filter Accounts.

Current Key: ACCOUNT NUMBER: 1110E5100 0220 0271 01060 00000 00000

Processing Parameters

Target Budget Type: LVL DIR/TT

Budget Entry Format: Whole Dollars

Fiscal Year: 2025-2026

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 2025-2026 LVL DIR/TI column.

Budgetary Entries

Processing Parameters
Budget Process Description: 4203-BUDGETING Budget Type: LVL DIR/TI Fiscal Year: 2025-2026

Budgeted Amount For Selected Accounts
Total 2025-2026 LVL DIR/TI: 0.00 [Submit Budgetary Entries](#)

*Individual Accounts with Detail Budget Lines attached are disabled from being modified at the account level.
**Account data as of 03/18/25. Refresh Account Details

Views: General Filters: Vicki's Filter

Account Number Fund T Func Obj Fac Proj Subpr Prog	2025-2026 LVL DIR/TI	2024-2025 Original Budget	Submitted	Fund	IA*	Type	BD	Function
▶ 1110E7500 0310 4203 01000 00000 00000	0	0.00		1110		E		7500
▶ 1110E7500 0369 4203 01000 00000 00000	0					E		7500
▶ 1110E7900 0373 4203 01000 00000 00000	0					E		7900
▶ 1110E7500 0391 4203 01000 00000 00000	0					E		7500
▶ 1110E7500 0510 4203 01000 00000 00000	0	2,540.00		1110		E		7500
▶ 1110E7900 0510 4203 01000 00000 00000	0	200.00		1110		E		7900
▶ 1110E7500 0519 4203 01000 00000 00000	0	3,500.00		1110		E		7500
▶ 1110E7500 0642 4203 01000 00000 00000	0	0.00		1110		E		7500

Enter the budget amount into the account.

[Save & Continue Later](#)
[Insert New Account](#)

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: 2025-2026

Budgeted Amount For Selected Accounts
Total 2025-2026 LVL DIR/TI: 0.00 [Submit Budgetary Entries](#)

*Individual Accounts with Detail Budget Lines attached are disabled from being modified at the account level.
**Account data as of 03/18/25. Refresh Account Details

Views: General Filters: Vicki's Filter

Account Number Fund T Func Obj Fac Proj Subpr Prog	2025-2026 LVL DIR/TI	2024-2025 Original Budget	Submitted	Fund	IA*	Type	BD	Function
▶ 1110E7500 0310 4203 01000 00000 00000	0	0.00		1110		E		7500
▶ 1110E7500 0369 4203 01000 00000 00000	0	0.00		1110		E		7500
▶ 1110E7900 0373 4203 01000 00000 00000	0	450.00		1110		E		7900
▶ 1110E7500 0391 4203 01000 00000 00000	0	0.00		1110		E		7500
▼ 1110E7500 0510 4203 01000 00000 00000	0	2,540.00		1110		E		7500

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

[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

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

[Save & Continue Later](#)
[Insert New Account](#)

Detail Budget Items

Budget Account Information

Account Number: 1110E7500 0510 4203 01000 00000 0000

Budget Type: LVL DIR/II

Fiscal Year: 2025-2026

Total Amount: 0.00

Views: General Filters: Skyward Default Clone

Line Nbr Description

There are no records to display; check your filter settings.

Add
Edit
Delete
Clone
Move Up
Move Down
Back

3. Click the **Add** button.

Detail Maintenance

Detail Budget Item Maintenance

Line Number: 1

* Description: Description of Budgeted Item

Maximum characters: 256, Remaining characters: 228

* Amount: 500

Save
Back

Asterisk (*) denotes a required field

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

Detail Budget Items



Budget Account Information

Account Number: 1110E7500 0310 4203 01000 00000 0000

Budget Type: LVL DIR/TI

Fiscal Year: 2025-2026

Total Amount: 1,150.00

Views: General ▾

Filters: Skyward Default Clone ▾



Add

Edit

Delete

Clone

Move Up

Move Down

Back

Line Nbr ▲	Description	
1	Description of budgeted item	
2	2nd budgeted item	
3	3rd budgeted item	
4	4th budgeted item	

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 workflow.

Budgetary Entries

Processing Parameters

Budget Process Description: 4203-BUDGETING

Budget Type: LVL DIR/TI

Fiscal Year: 2025-2026

Budgeted Amount For Selected Accounts

Total 2025-2026 LVL DIR/TI: 6,150.00

Submit Budgetary Entries

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

Account data as of 03/24/25. Refresh Account Details **CHANGES HAVE NOT BEEN SUBMITTED

Views: General ▾ Filters: Vicki's Filter ▾

Account Number	Fund	T	Func	Obj	Fac	Proj	Subpr	Prog	2025-2026 LVL DIR/TI	2024-2025 Original Budget	Submitted	Fund	IA*	Type	BD	Function
▶ 1110E7500 0310 4203 01000 00000 00000									1,150	0.00		1110		E	Y	7500
▶ 1110E7500 0369 4203 01000 00000 00000									0	0.00		1110		E		7500
▶ 1110E7900 0373 4203 01000 00000 00000									0	450.00		1110		E		7900
▶ 1110E7500 0391 4203 01000 00000 00000									0	0.00		1110		E		7500
▶ 1110E7500 0510 4203 01000 00000 00000									2600	2,540.00		1110		E		7500
▶ 1110E7900 0510 4203 01000 00000 00000									200	200.00		1110		E		7900
▶ 1110E7500 0519 4203 01000 00000 00000									2200	3,500.00		1110		E		7500
▶ 1110E7500 0642 4203 01000 00000 00000									0	0.00		1110		E		7500
▶ 1110E7500 0644 4203 01000 00000 00000									0	0.00		1110		E		7500
▶ 1110E7500 0648 4203 01000 00000 00000									0	0.00		1110		E		7500
▶ 1110E7500 0649 4203 01000 00000 00000									0	0.00		1110		E		7500
▶ 1110E7500 0692 4203 01000 00000 00000									0	0.00		1110		E		7500
▶ 1110E7500 0731 4203 01000 00000 00000									0	100.00		1110		E		7500
▶ 1110E7730 0732 4203 01000 00000 00000									0	0.00		1110		E		7730

500 ▾ 14 records displayed

Account:

Break Totals

Account Number	2025-2026 LVL DIR/TI	2024 - 2025 Original Budget
01000 - - - - -	6,150.00	6,790.00

Enter Different Account Breaks

View Break Total Details

Budgetary Entry for 4203-BUDGETING



Processing Messages

Starting the Run Update Process

Processing. . . .

Back

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

Processing Status

Process Title: Budgetary Entry Processing

Process Description: Updating Records...

Current Key:

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**