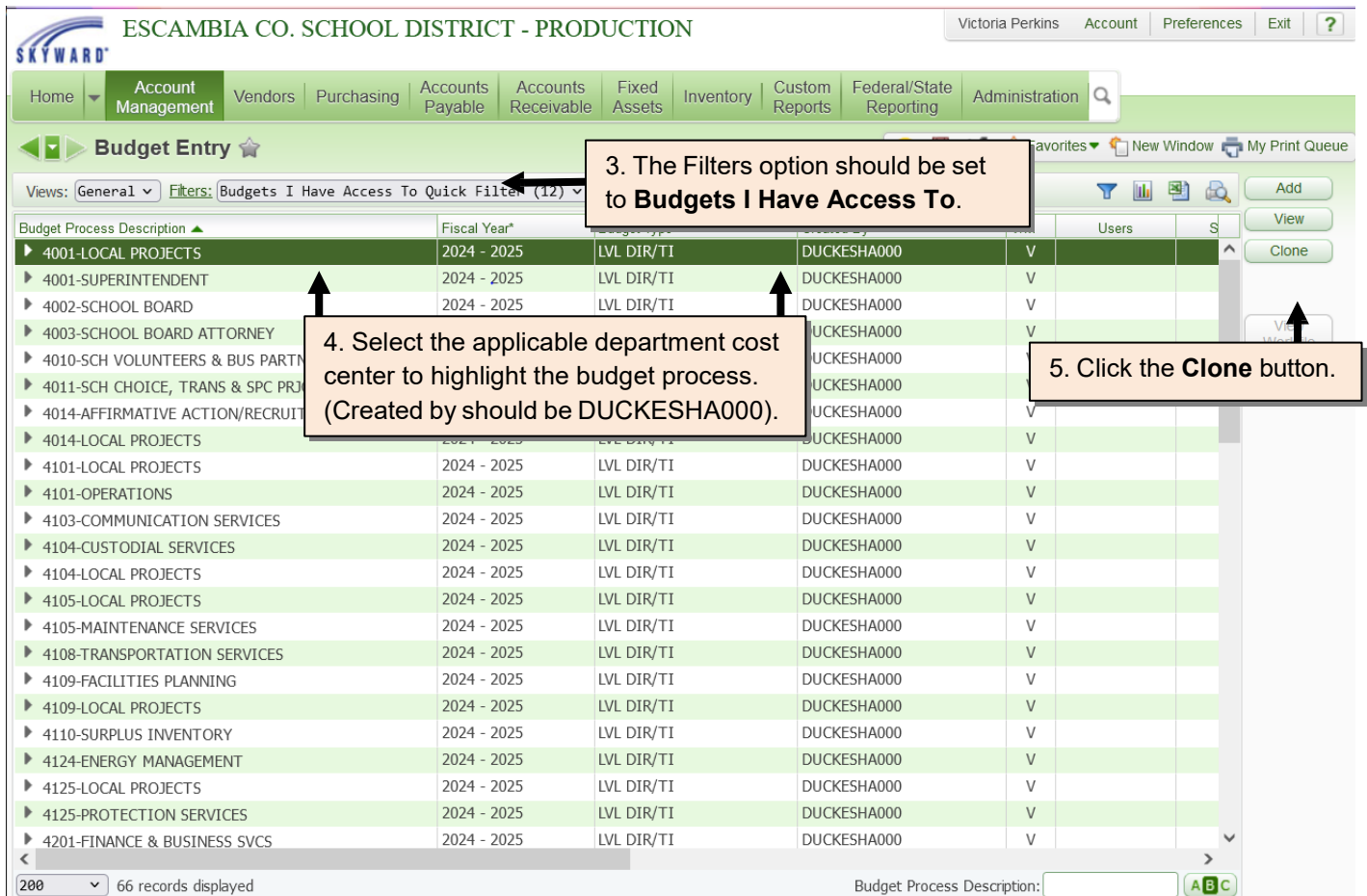
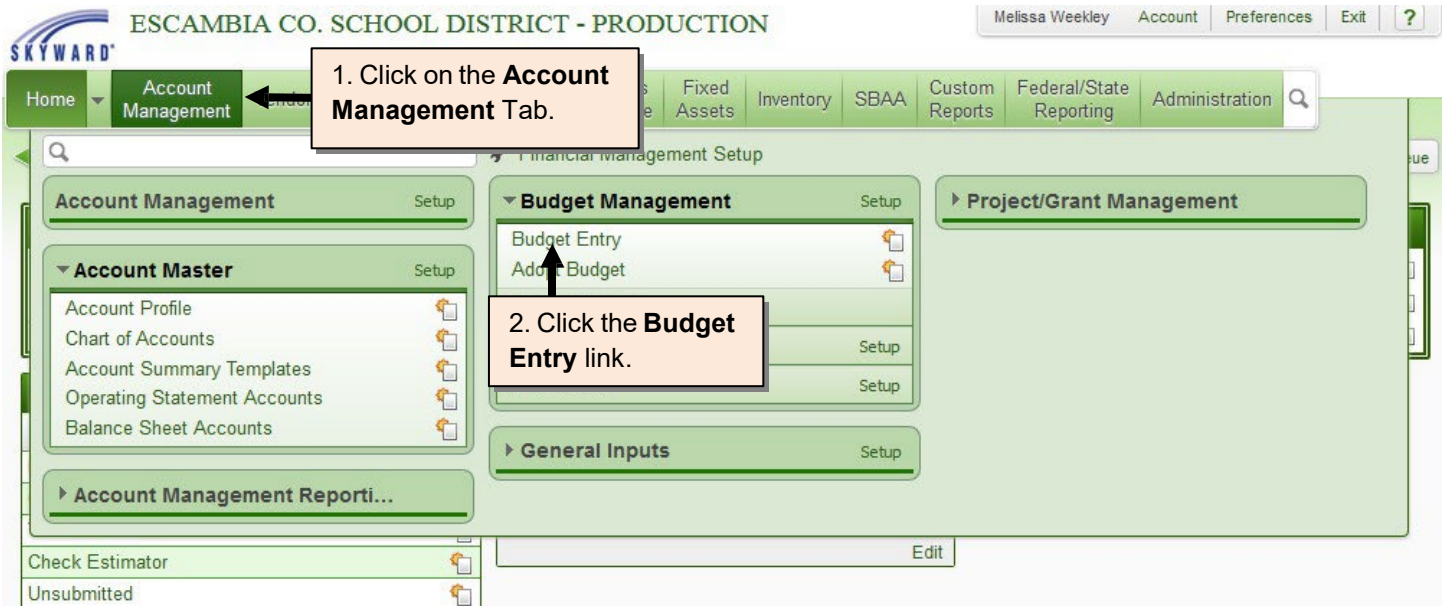


# Budget Entries in Skyward

## Building the Workfile





Budget Entry

- Process Information
- Parameters
- Breaks

**Process Information**

\* Description: 4203-BUDGETING

\* Budget Year to Process: 2024-2025: July 1, 2024 - June 30, 2025

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



Budget Entry

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

**Process Information**

\* Description: 4203-BUDGETING

\* Budget Year to Process: 2024-2025: July 1, 2024 - June 30, 2025

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.				

Add  
Delete



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*	Users	Sts	Last Edited By	La:
4203-BUDGETING	2024 - 2025	LVL DIR/TI	PERKIVIC000			

Buttons: Add, Edit, Clone, Individual Budget Entry, View Workfile, Delete Workfile

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: 2024-2025

10. Click the Build New Workfile button.

**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: 4450E6500 0210 0291 06720 20220 00000

Processing Parameters

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

Fiscal Year: 2024-2025

## 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 2024-2025 LVL DIR/TI column.

**Budgetary Entries**

**Processing Parameters**  
 Budget Process Description: 4203-BUDGETING      Budget Type: LVL DIR/TI      Fiscal Year: 2024-2025

**Budgeted Amount For Selected Accounts**  
 Total 2024-2025 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 05/13/24. Refresh Account Details

Account Number	2024-2025 LVL DIR/TI	2023-2024 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							7500
1110E7500 0391 4203 01000 00000 00000	0							7500
1110E7500 0510 4203 01000 00000 00000	0							7500
1110E7900 0510 4203 01000 00000 00000	0	0.00		1110		E		7900
1110E7500 0519 4203 01000 00000 00000	0	3,000.00		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

**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: 2024-2025

**Budgeted Amount For Selected Accounts**  
 Total 2024-2025 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 Number	2024-2025 LVL DIR/TI	2023-2024 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
1110E7500 0391 4203 01000 00000 00000	0	0.00		1110		E		7500

### Detail Budget Items

Account Number: 1110E7500 0310 4203 01000 00000 00000  
 Budget Type: LVL DIR/TI  
 Fiscal Year: 2024-2025  
 Total Amount: 0.00

Views: **General** Filters: Skyward Default Clone

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

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  
 \* Amount: 500

Maximum characters: 256, Remaining characters: 228

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 0000C  
 Budget Type: LVL DIR/TI  
 Fiscal Year: 2024-2025  
 Total Amount: 1,150.00

Views: General Filters: Skyward Default Clone

Line Nbr	Description	Amount
1	Description of Budgeted Item	500
2	2nd Budgeted Item	300
3	3rd Budgeted Item	200
4	4th Budgeted Item	150

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 workflow.

### Budgetary Entries

Processing Parameters: Budget Process Description: 4203-BUDGETING Budget Type: LVL DIR/TI Fiscal Year: 2024-2025

Budgeted Amount For Selected Accounts: Total 2024-2025 LVL DIR/TI: 6,150.00

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 05/13/24. Refresh Account Details CHANGES HAVE NOT BEEN SUBMITTED

Views: General Filters: Vicki's Filter

Account Number	2024-2025 LVL DIR/TI	2023-2024 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
1110E7500 0391 4203 01000 00000 00000	0	0.00		1110		E		7500
1110E7500 0510 4203 01000 00000 00000	3000	3,590.00		1110		E		7500
1110E7900 0510 4203 01000 00000 00000	0	0.00		1110		E		7900
1110E7500 0519 4203 01000 00000 00000	2000	3,000.00		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

500 17 records displayed Account: [ ]

Account Number	2024-2025 LVL DIR/TI	2023 - 2024 Original Budget
01000	6,150.00	6,790.00
01100	0.00	3,000.00

Buttons: 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

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**