

Slide 1 - Slide 1

The screenshot shows the Skyward Financial Management web application interface. The browser title is "Web Financial Management - WF - 10636 - 04.12.02.00.12 - Windows Internet Explorer". The user is logged in as "Cat Smith" with an "Account" role. A "Print this tutorial" button is visible in the top right. The navigation menu includes: Home, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, and Bid Management. The main content area is titled "Financial Management Setup" and contains three panels: "Account Management" (with sub-items: Project/Grant Management, Budgetary Data Mining, Reports, Batch Reports), "Account Master" (with sub-items: Account Profile, Chart of Accounts, Account Summary Templates, Operating Statement Accounts, Balance Sheet Accounts, Custom Programming), "Budget Management" (with sub-items: Budget Entry, Budget Revisions, Budget Changes, Budget Closures), and "General Inputs" (with sub-items: Submit Journal Entry, Approve Journal Entry). A yellow callout box is overlaid on the "Budget Entry" link in the Budget Management panel. The callout box contains the following text:

**Individual Entry
Budget Entry Processing**

Click Financial Management, Account Management, Budget Management, Budget Entry.

Who, What, When, Why?
Individual Budget Entry is used by individuals responsible for building part of a budget after a budget process has been created.

It allows users to work with smaller, more-manageable sections of the budget at a time and build the budget type amounts in pieces.

At the bottom of the interface, there is a copyright notice: "© 2012 Skyward, Inc. All rights reserved." and view options: "Desktop View" (selected) and "Button Rows" (unselected), with the text "Windows XP / Internet Explorer 7". The status bar at the bottom right shows "Local intranet" and "100%" zoom.

Slide 2 - Slide 2

Budget Entry - WFVAMBM1BE1BE - 26269 - 04.12.02.00.12 - Windows Internet Explorer

Skyward School District

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

Budget Entry

Views: General Filters: *All Budget Entries

Budget Process Description	Fiscal Year	Budget Type	Created By	V/M	Sts	Last Edited By
▶ Music Department	2011 - 2012	Music	SMITHCAT000	V		
▶ New Budget - Original	2012 - 2013	Original	SMITHNAN000	M	S	SMITHNAN000

Existing budget processes appear in the browse.

To enter budget amounts for the highlighted budget process, (which can then be submitted to the selected budget type), click Individual Budget Entry.

20 2 records displayed Lookup Description: ABC

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Slide 3 - Slide 3

Budgetary Entry Processing

Budgetary Entry for Music Department

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: Budget Entry Format:

Fiscal Year:

Process Title:

Process Description:

Current Key:

Processing Messages: Click **Build New Workfile** to build the browse of accounts.

I have already run the step to build the workfile.

I left this in the instructions in case you need to re-run

Navigation: Home, Act, Mana, Budge, Views: General, Budget Process Descr, Music Departmer, New Budget - O

My Print Queue: Add, Edit, Delete, Clone, Individual Budget Entry, Mass Change, Delete Workfile

Status: Done, Local intranet, 100%

Slide 4 - Slide 4

Budgetary Entries - WFLAM\BMBE\PR - 26270 - 04.12.02.00.12 - Windows Internet Explorer

Budgetary Entries

Processing Parameters
 Budget Process Description: Music Department

Budgeted Amount For Selected Accounts
 Total 2011-2012 Music: 35,150.00 CHANGES HAVE NOT BEEN SUBMITTED Submit Budgetary Entries

*Individual Accounts with Detail Budget Lines attached are disabled from being modified
 **Account data as of 04/27/12. Refresh Account Details

Views: General Filters: *Skyward Default

Account Number	Fd	T	Loc	Obj	Func	Prj	IA	BD	2011-2012 Music	Su
▶ 10 E 400 310 125400 000									3500	10 E 400 310
▶ 10 E 400 310 125500 000									28000	10 E 400 310
▶ 10 E 400 310 126000 000									350	10 E 400 310
▶ 10 E 400 310 129100 000									275	10 E 400 310
▶ 10 E 400 310 143000 000									1525	10 E 400 310
▶ 10 E 400 310 161339 339									1000	10 E 400 310
▶ 10 E 400 310 162105 105									0	10 E 400 310
▶ 10 E 400 310 162108 108									500	10 E 400 310

20 records displayed

Break Totals

Account Number	2011-2012 Music
10 E 400 310 -----	35,150.00
10 E 400 320 -----	0.00
10 E 400 341 -----	0.00
10 E 400 342 -----	0.00
10 E 400 345 -----	0.00

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3. A **grand total** for this budget process displays here.

This allows individuals entering budgets to monitor their **total allocation** for the selected accounts.

4. To save these amounts as a work in progress, click **Save & Continue Later**, otherwise click **Submit Budgetary Entries** to write these amounts to the budget type selected for this budget process.

1. **Enter** budget amounts for the accounts in the browse.

2. **Totals** based on the selected breaks will display here.

Click **Enter Different Account Breaks** to change how the totals are displayed.

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Budgetary Entries - WFVAM\BMBE\PR - 26270 - 04.12.02.00.12 - Windows Internet Explorer

Budgetary Entries

Processing Parameters
Budget Process Description: Music Department Budget Type: Music Fiscal Year: 2011-2012

Budgeted Amount For Selected Accounts
Total 2011-2012 Music: 35,150.00 **CHANGES HAVE NOT BEEN SUBMITTED** [Submit Budgetary Entries](#)

*Individual Accounts with Detail Budget Lines attached are disabled from being modified at the account level.
**Account data as of 04/27/12. [Refresh Account Details](#)

Views: General Filters: *Skyward Default

Account Number	Fd	T	Loc	Obj	Func	Prj	IA	BD	2011-2012 Music	Submitted	Fund	Type	Location	Object/Source
▶ 10 E 400 310 125400 000									3500		10	E	400	310
▶ 10 E 400 310 125500 000													400	310
▶ 10 E 400 310 126000 000													400	310
▶ 10 E 400 310 129100 000													400	310
▶ 10 E 400 310 143000 000													400	310
▶ 10 E 400 310 161339 339													400	310
▶ 10 E 400 310 162105 105													400	310
▶ 10 E 400 310 162108 108									500				400	310

20 records displayed Account: _____

Break Totals

Account Number	2011-2012 Music
10 E 400 310 -----	35,150.00
10 E 400 320 -----	0.00
10 E 400 341 -----	0.00
10 E 400 342 -----	0.00
10 E 400 345 -----	0.00

Enter Different Account Breaks View Break Total Details

Windows Internet Explorer

By clicking OK the update process will be run.
Are you sure you want to run the update?

OK Cancel

Click OK to run the update.

javascript:if (cbs("bRun")) {checkRecords("Cleanup");}

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Slide 6 - Slide 6

The screenshot shows a web browser window titled "Budgetary Entries - WFLAM\BMBE\PR - 26270 - 04.12.02.00.12 - Windows Internet Explorer". The main content area is titled "Budgetary Entries" and contains a "Processing Parameters" section with a "Budget Process" dropdown. Below this is a "Budgeted Amount" section with a "Total 2011-2012" field. A "Process Options" dialog box is open in the center, containing two buttons: "View Report" and "Update Complete - Press to Close". A yellow callout box points to the "View Report" button with the text: "Click **View Report** if you would like to save or print a copy of the report or click Update Complete - Press to Close to **close** the process." To the right of the dialog box are buttons for "Save & Continue Later", "Enter Different Account Breaks", and "View Break Total Details". On the left side, there is a "Views: General" dropdown and a table of account numbers. At the bottom, a "Break Totals" table is visible.

Account Number	Amount
10 E 400 310	0.00
10 E 400 320	0.00
10 E 400 341	0.00
10 E 400 342	0.00
10 E 400 345	0.00

Slide 7 - Slide 7

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04.12.02.00.11

SCRAMBLED DATABASE
Budgetary Entry Processing: Music Department

04/27/12
Page:1
9:37 AM

Budgetary Entry Processing Complete.

Account Number	Amount
10 E 400 310 125400 000	3,500.00
10 E 400 310 125500 000	28,000.00
10 E 400 310 126000 000	350.00
10 E 400 310 129100 000	275.00
10 E 400 310 143000 000	1,525.00
10 E 400 310 161339 339	
10 E 400 310 162105 105	
10 E 400 310 162108 108	
10 E 400 310 162113 113	0.00
10 E 400 310 162116 116	0.00
10 E 400 310 162117 117	0.00
10 E 400 310 162119 119	0.00
10 E 400 310 162121 121	0.00
10 E 400 310 162124 124	0.00
10 E 400 310 162190 190	0.00
10 E 400 310 162204 204	0.00
10 E 400 310 162205 205	0.00
10 E 400 310 162208 208	0.00
10 E 400 310 162210 210	0.00
10 E 400 310 162219 219	0.00
10 E 400 310 162222 222	0.00
10 E 400 310 162224 224	0.00
10 E 400 310 163307 307	0.00
10 E 400 310 163309 309	0.00

This is a sample of the Budgetary Entry Processing report.

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Budget Approval - WFVAM\BM\RE\BA - 11561 - 04.12.02.00.12 - Windows Internet Explorer

Skyward School District

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

Budget Approval

Budget Accounts - Budget Year 2011-2012 Current Fiscal Year

Account Number Fd T Loc Obj Func Prj	Budget Type Elem(1)	Budget Type Music(1)	Budget Type Orig(1)	Budget Type PRPSD(1)	Budget Type Scien(1)
▶ 10 E 400 251 241000 000		772.32	0.00		0.00
▶ 10 E 400 251 241050 000		239.54	0.00		0.00
▶ 10 E 400 310 125400 000		3,500.00	0.00		0.00
▶ 10 E 400 310 125500 000		28,000.00	0.00		0.00
▶ 10 E 400 310 126000 000		350.00	0.00		0.00
▶ 10 E 400 310 162117 117		275.00	0.00		0.00
▶ 10 E 400 310 162119 119		1,525.00	0.00		0.00
▶ 10 E 400 310 162121 121		1,000.00	0.00		0.00
▶ 10 E 400 310 162124 124		0.00	0.00		0.00
▶ 10 E 400 310 162190 190		0.00	0.00		0.00
▶ 10 E 400 310 162204 204		0.00	0.00		0.00
▶ 10 E 400 310 162205 205		0.00	0.00		0.00
▶ 10 E 400 310 162208 208		0.00	0.00		0.00
▶ 10 E 400 310 162117 117		0.00	0.00		0.00
▶ 10 E 400 310 162119 119		0.00	0.00		0.00
▶ 10 E 400 310 162121 121		0.00	0.00		0.00
▶ 10 E 400 310 162124 124		0.00	0.00		0.00
▶ 10 E 400 310 162190 190		0.00	0.00		0.00
▶ 10 E 400 310 162204 204		0.00	0.00		0.00
▶ 10 E 400 310 162205 205		0.00	0.00		0.00
▶ 10 E 400 310 162208 208		0.00	0.00		0.00

20 records displayed Account Number: ABC

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After submitting the budgetary entries, the amounts entered now appear in the corresponding budget type column on the Budget Approvals for Requisitions screen (located under WFVAM\BM\RE\BA). This concludes the tutorial.

Filter Options: Edit, Mass Process Budgets, Email Budget Request Status, Clone Budget Amounts to Next Fiscal Year, Mass Edit Budget Amounts for Accounts in the Browse