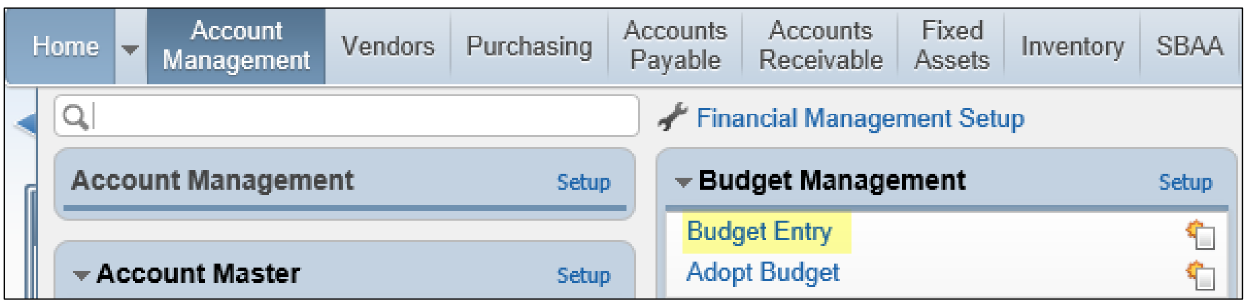
Account Management

Budget Entry

As an alternative to the requisition process, users can build a budget process with user-defined ranges of accounts, alternate sequences, totals, and fields to build a working budget.

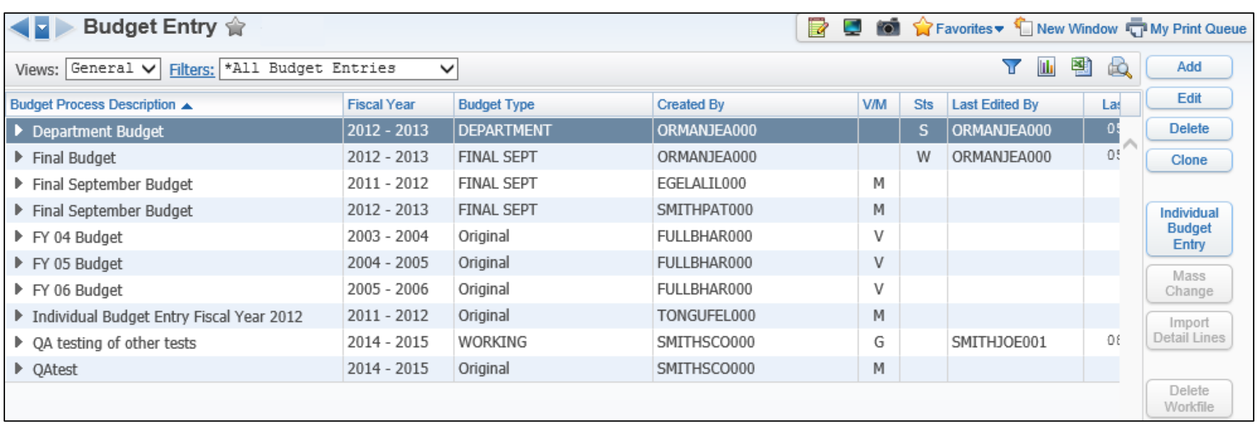
Amounts can then be entered for each account or mass processes can be used before submitting the budget entries to a selected budget type or the original budget. This allows users to work with smaller, more manageable sections of the budget at a time and build the budget type amounts in pieces.

Navigate to Web Financial Management > Account Management > Budget Management > Budget Entry.



The Budget Entry browse will display. Use the Filters to set your Budget Entry browse screen; you can select All Budget Entries or My Budget Entries Only.

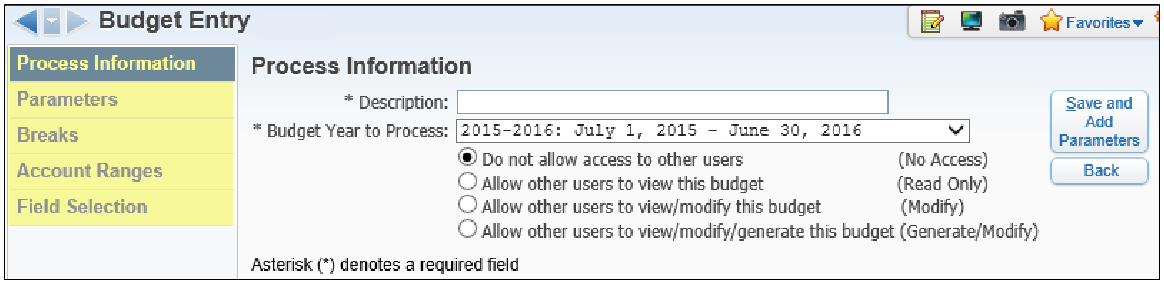
On the right side of the screen are the maintenance options. What buttons are available may vary depending on the budget status, who created the budget, and user permissions.



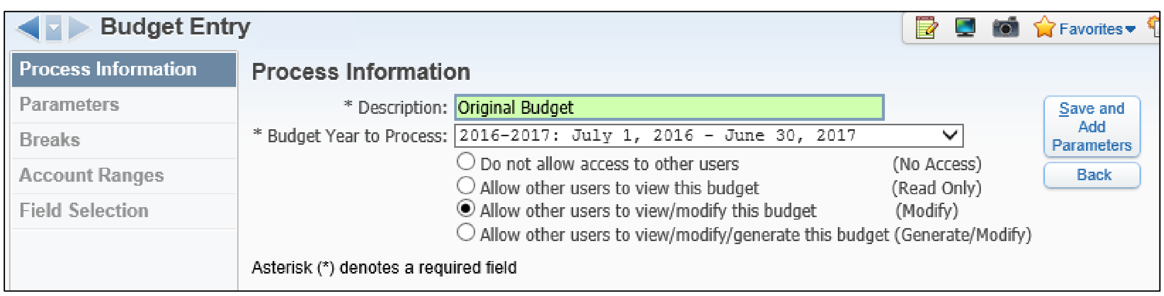
To begin the budget entry process, create a new budget by selecting the Add button.

The next screen that opens is the Process Information tab. As you add and save you will be prompted through each of the tabs listed on the left.

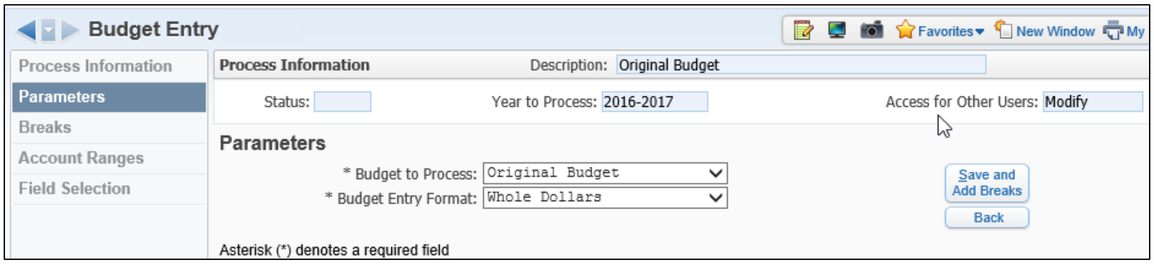
Enter and select the information accordingly, then select the Save option for that tab to continue to the next, and then to finish.



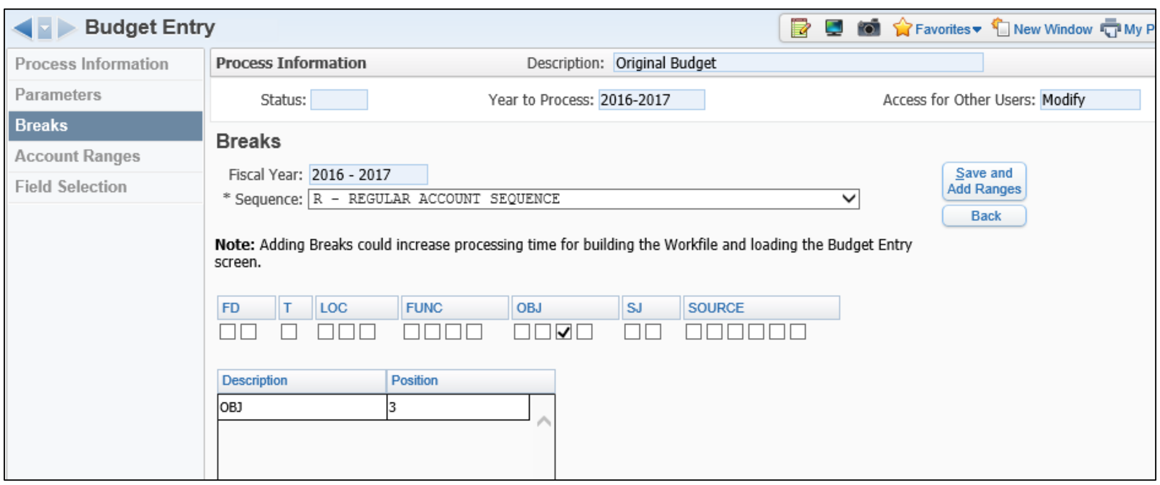
Process Information Tab Options	Description
Description	Add a description for the budget entry.
Budget Year to Process	Use the drop-down to select the budget year.
Other User Access	Select one of the radio button options for what access, if any, other users might have to this budget.
Save and Add Parameters	Save this budget process and continue to the next step.



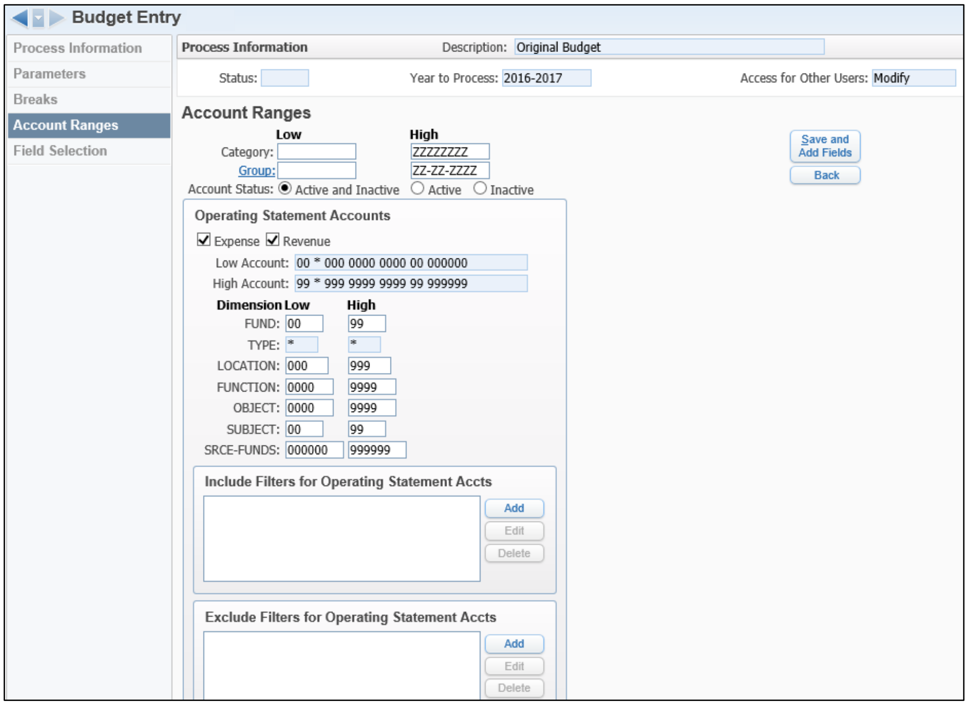
Parameters Tab Options	Description
Budget to Process	Select the Budget to process. Once budget amounts are entered, they will be submitted to the budget selected here.
Budget Entry Format	Select how to format the budget: Using Whole Dollars or Dollars and Cents.
Save and Add Breaks	Save the budget parameters and add fields.



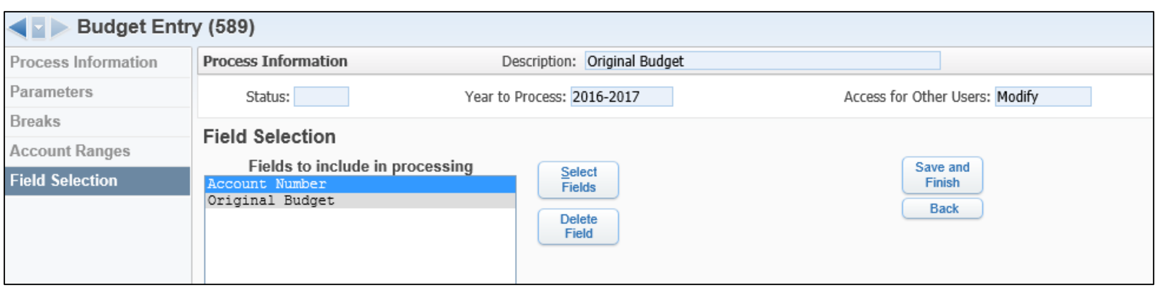
Breaks Tab Options	Description
Sequence	Select the account sequence to be used when displaying records in the budget entry browse.
Breaks	The account dimensions listed are determined by the selected account sequence. Breaks (total lines) can be built here to view totals by account dimensions. Selections will display in the Description/Position table below.
Save and Add Ranges	Save the selected breaks and add ranges.



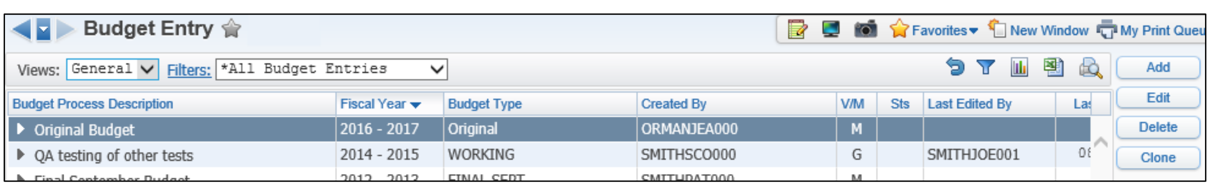
Account Ranges Tab Options	Description
Account Ranges	Define the range of accounts to use for this budget entry process. Users will be limited to the range of accounts based on their account groups (if applicable) but can further restrict the range of accounts to make budget entry more manageable.
Save and Add Fields	Save the ranges and add fields.



Field Selection Tab Options	Description
Field Selection	The account number and budget selected will automatically be selected as fields. Additional fields can be added and removed using the Select Fields and Delete Field buttons respectively.
Save and Finish	Save the selected fields and return to the working budget browse.



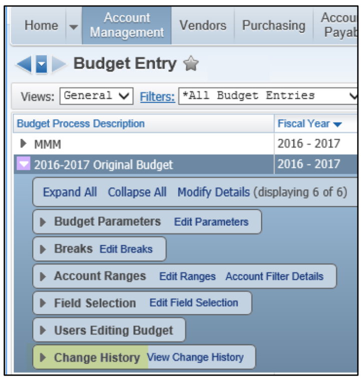
The budget Process is now listed in the browse. Individual Budget Entry, Mass Change, and Import Detail Lines options can now be used on this budget process.



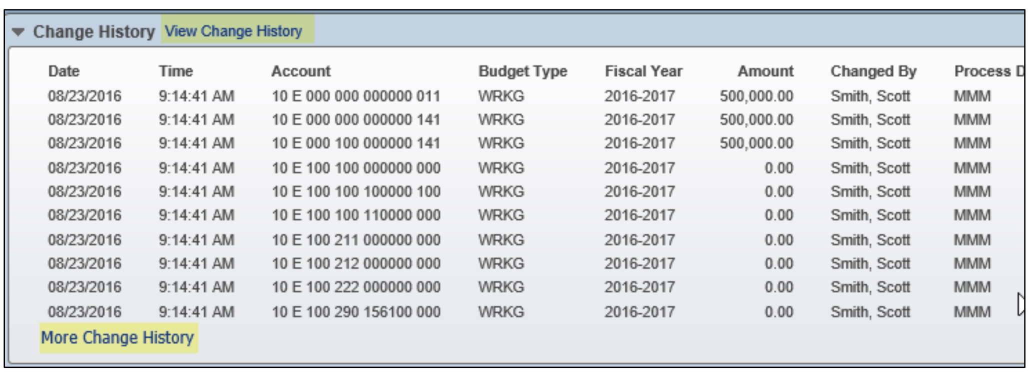
With the October, 2016 Release, changes to the original or revised budget fields, along with any budget types, are now captured and displayed as Change History. These changes can be found on either the Account Profile Budget tab or the Budget Entry detail node.

The Budget Entry browse includes a Change History node which displays all the accounts updated by the selected process. The node includes Date, Time, Account, Budget Type, Fiscal Year, Amount, and Changed By.

On the Budget Entry browse, select a process, then expand the details; a Change History detail node is available.



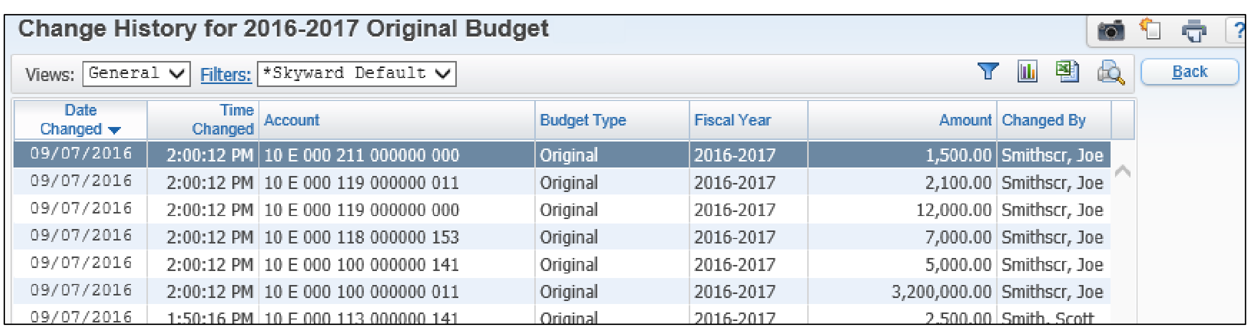
Expand the Change History node. The Change History details will display up to the last 10 accounts that were updated by this process. If there are more than 10 records a More Change History link displays. You can use this to open a browse screen to view the entire list.


Change History View Change History

Date	Time	Account	Budget Type	Fiscal Year	Amount	Changed By	Process D
08/23/2016	9:14:41 AM	10 E 000 000 000000 011	WRKG	2016-2017	500,000.00	Smith, Scott	MMM
08/23/2016	9:14:41 AM	10 E 000 000 000000 141	WRKG	2016-2017	500,000.00	Smith, Scott	MMM
08/23/2016	9:14:41 AM	10 E 000 100 000000 141	WRKG	2016-2017	500,000.00	Smith, Scott	MMM
08/23/2016	9:14:41 AM	10 E 100 100 000000 000	WRKG	2016-2017	0.00	Smith, Scott	MMM
08/23/2016	9:14:41 AM	10 E 100 100 100000 100	WRKG	2016-2017	0.00	Smith, Scott	MMM
08/23/2016	9:14:41 AM	10 E 100 100 110000 000	WRKG	2016-2017	0.00	Smith, Scott	MMM
08/23/2016	9:14:41 AM	10 E 100 211 000000 000	WRKG	2016-2017	0.00	Smith, Scott	MMM
08/23/2016	9:14:41 AM	10 E 100 212 000000 000	WRKG	2016-2017	0.00	Smith, Scott	MMM
08/23/2016	9:14:41 AM	10 E 100 222 000000 000	WRKG	2016-2017	0.00	Smith, Scott	MMM
08/23/2016	9:14:41 AM	10 E 100 290 156100 000	WRKG	2016-2017	0.00	Smith, Scott	MMM

More Change History

The View Change History link will also open this same browse screen. The Change History browse screen allows a more complete viewing of the records and also allows for sorting and dumping the data to Excel.

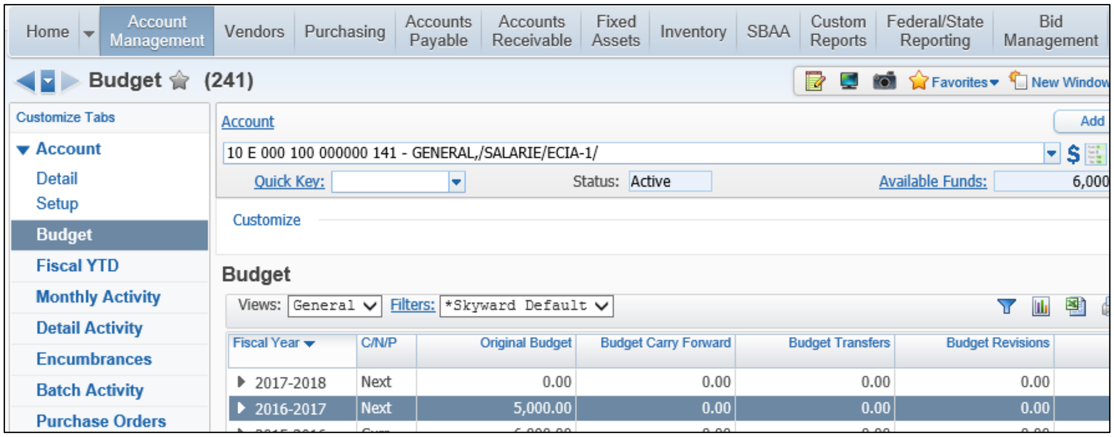

Change History for 2016-2017 Original Budget

Views: General Filters: *Skyward Default Back

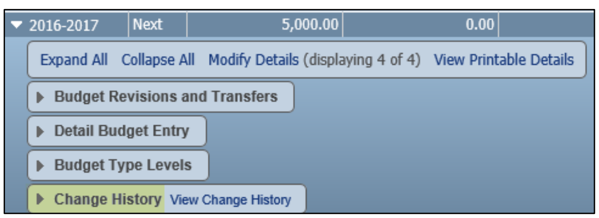
Date Changed	Time Changed	Account	Budget Type	Fiscal Year	Amount	Changed By
09/07/2016	2:00:12 PM	10 E 000 211 000000 000	Original	2016-2017	1,500.00	Smithscr, Joe
09/07/2016	2:00:12 PM	10 E 000 119 000000 011	Original	2016-2017	2,100.00	Smithscr, Joe
09/07/2016	2:00:12 PM	10 E 000 119 000000 000	Original	2016-2017	12,000.00	Smithscr, Joe
09/07/2016	2:00:12 PM	10 E 000 118 000000 153	Original	2016-2017	7,000.00	Smithscr, Joe
09/07/2016	2:00:12 PM	10 E 000 100 000000 141	Original	2016-2017	5,000.00	Smithscr, Joe
09/07/2016	2:00:12 PM	10 E 000 100 000000 011	Original	2016-2017	3,200,000.00	Smithscr, Joe
09/07/2016	1:50:16 PM	10 E 000 113 000000 141	Original	2016-2017	2,500.00	Smith, Scott

The Budget tab for the Account Profile now contains a Change History node for each fiscal year. Any changes to the Original Budget or Revised Budget (Budget Transfers, Budget Revisions and Budget from Prior Year) are displayed in the Change History node.

Navigate to Web Financial Management > Account Management > Account Master > Account Profile and select the Budget tab.



Select the fiscal year to view then expand it. There is a new Change History node available. Expand the Change History node.



As with the Budget Entry Change History node, if there are more than 10 records listed a More Change History button will be available.

A View Change History link is also available. This will open the Change History browse screen where you can view the details, as well as sort and dump the information to Excel.