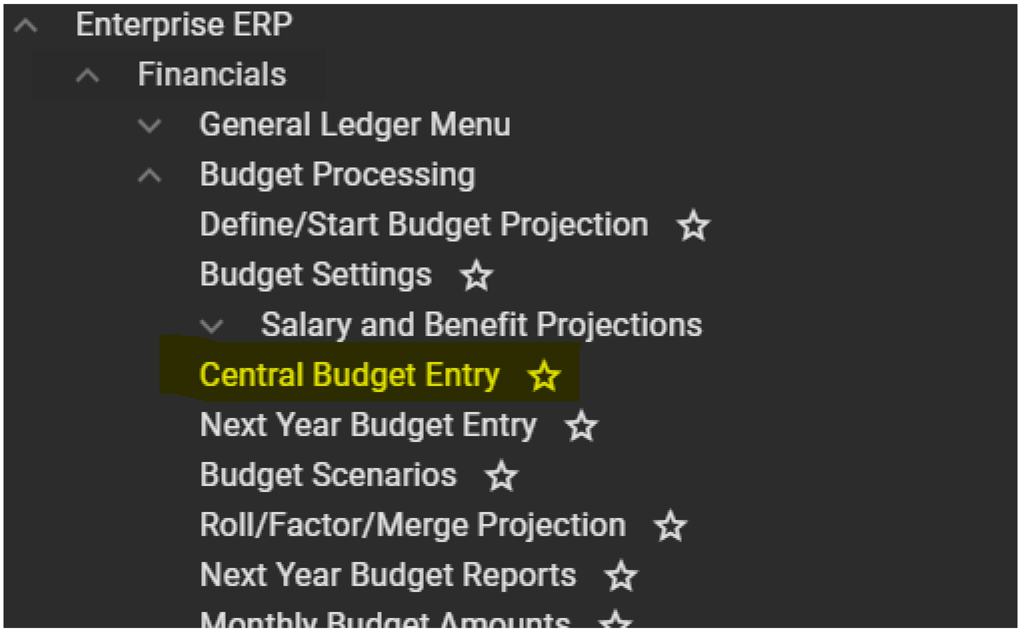
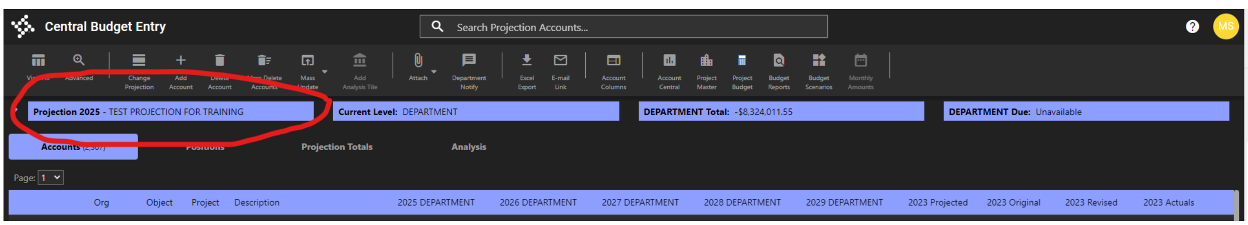
Central Budget Entry

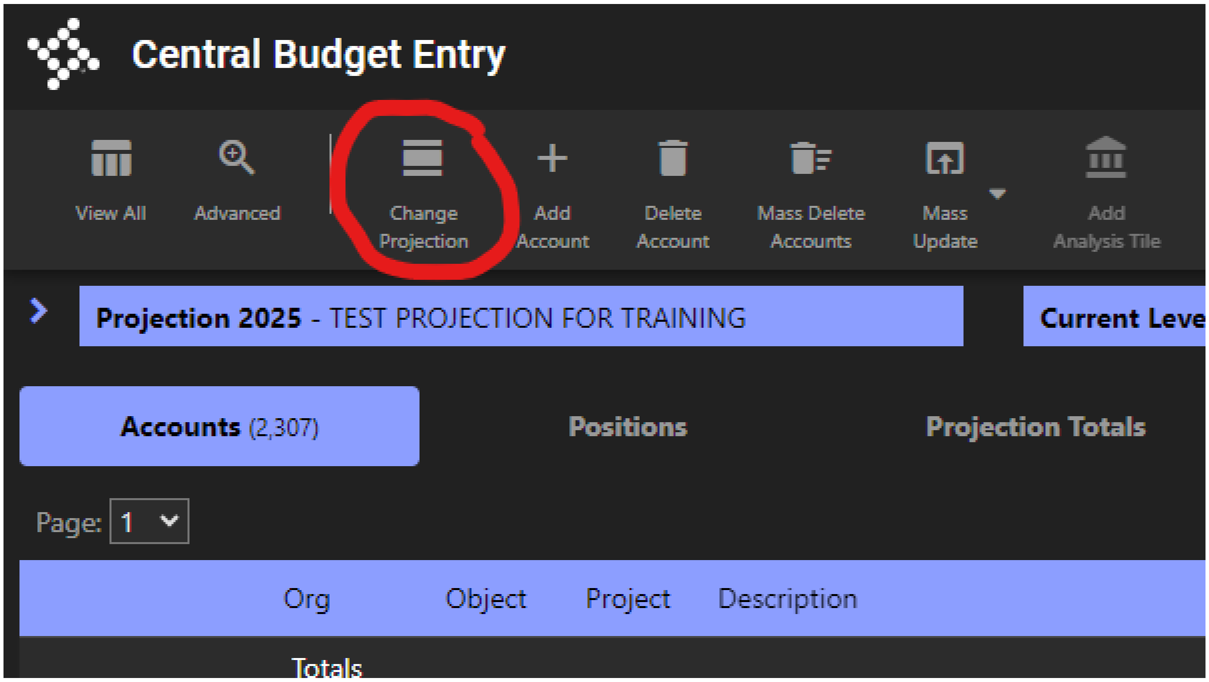
Financials>Budget Processing>**Central Budget Entry**



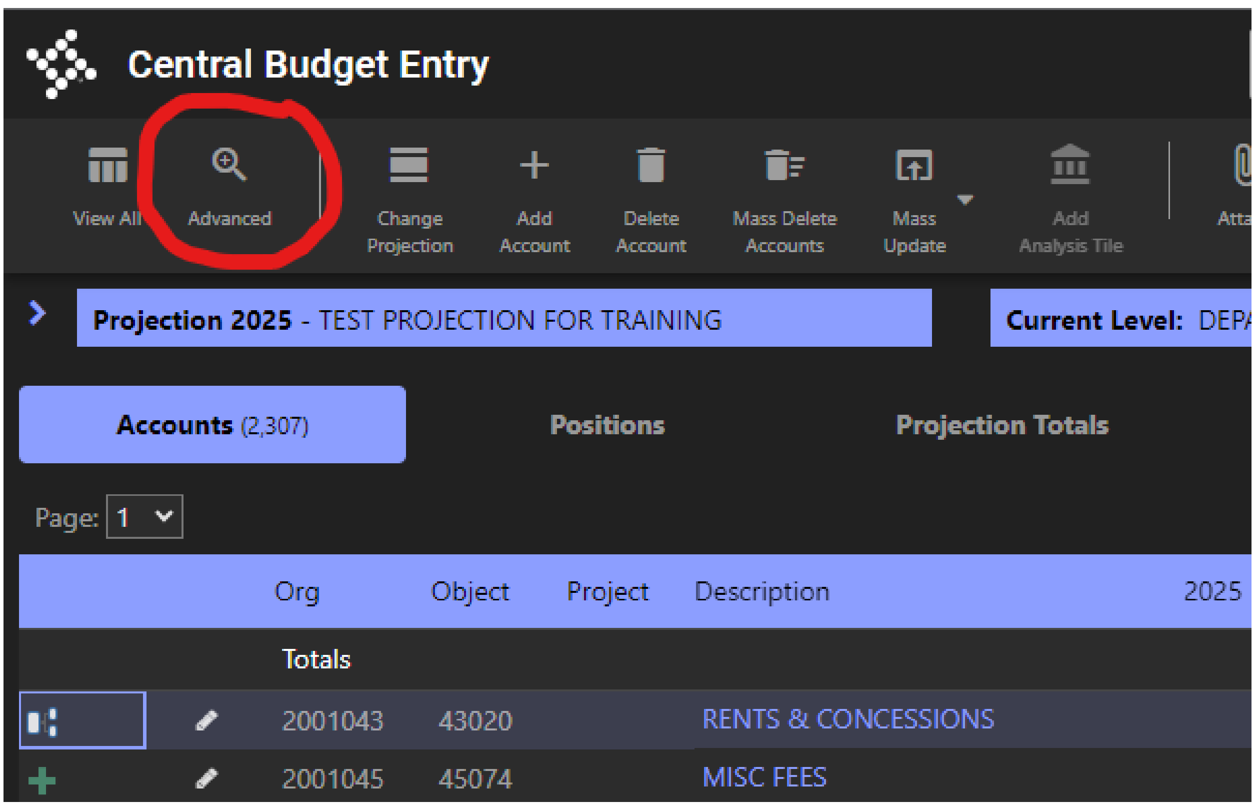
In Central Budget Entry – first, make sure you are in the correct projection.



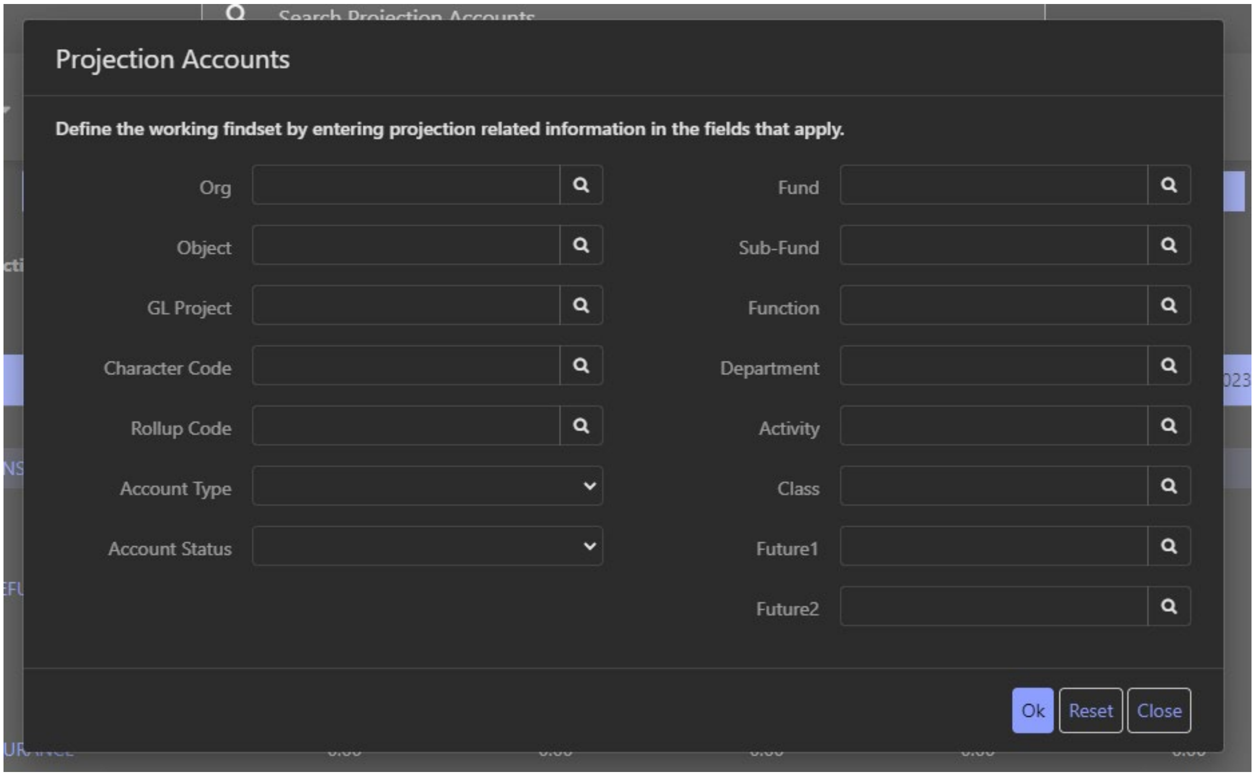
If you need to change the projection, click the “Change Projection” button and click on the correct projection.



Use the "Advanced" button – narrow down org/object or by Fund, Department, etc.



This is the screen you will see:



Budget Levels: 1 – Department, 2 – Department Head, 3 – Budget Officer, 4 – Board of Supervisors, 5 – Recommended

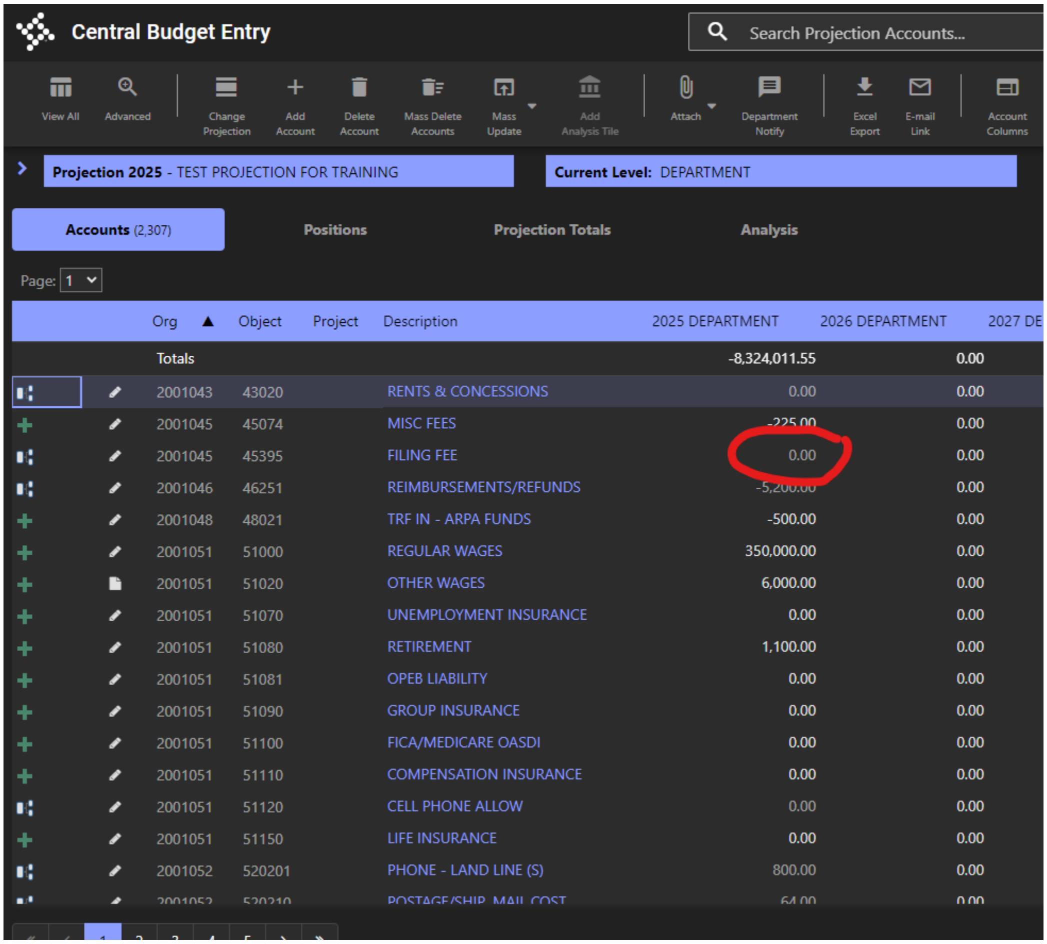
Depending on your job position, you will only have permissions to enter budget number into a specific level.

Total vs. Detail

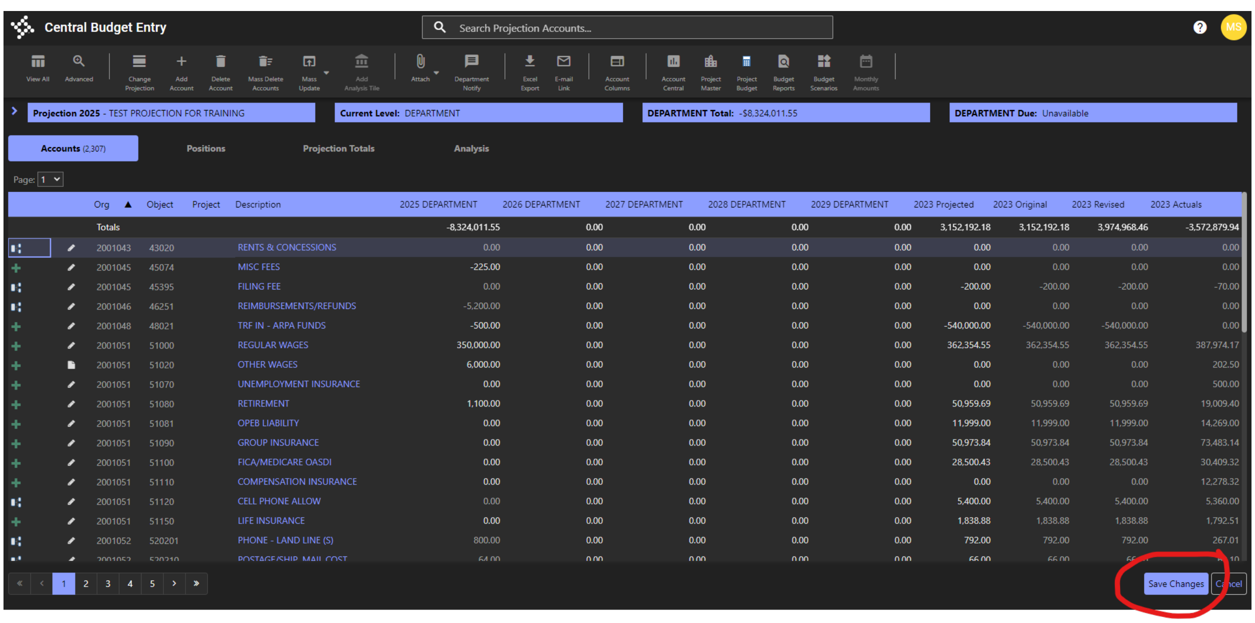
There are two ways to enter budget numbers – total amount or details that make up the total amount.

Total

Double-click into the field and enter the amount. Revenue accounts will automatically switch to negative.



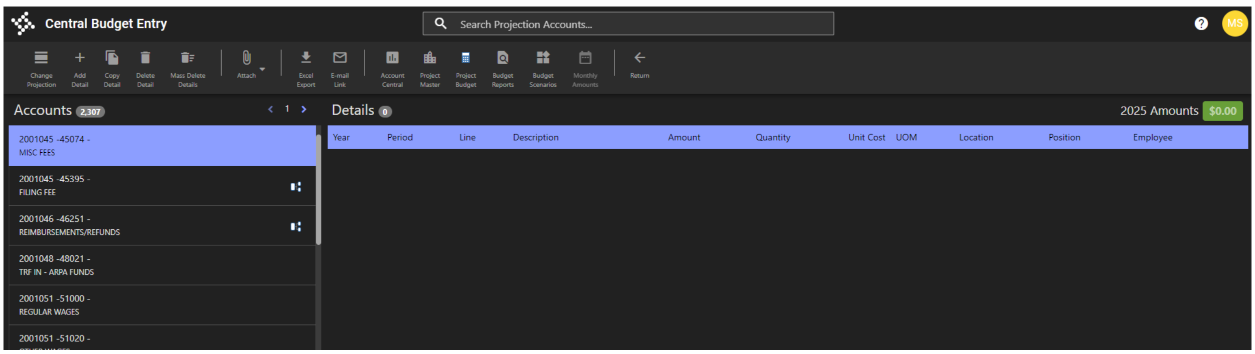
After the amount has been entered, click save at the bottom of the screen.



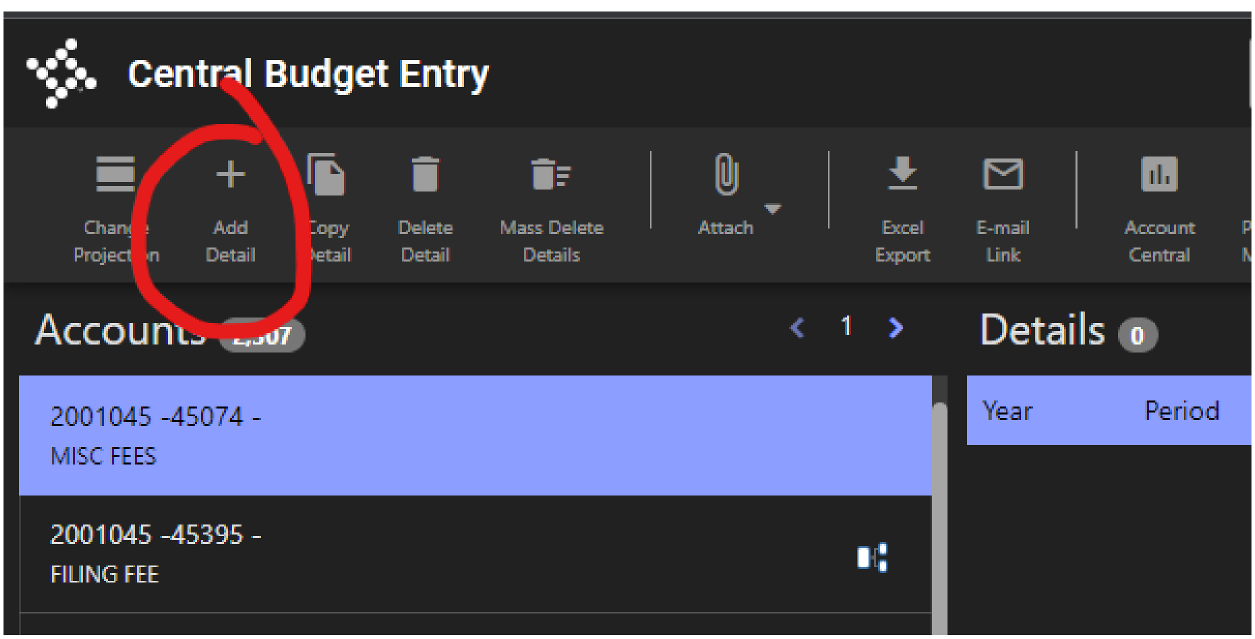
Detail **this can be especially helpful for the future.*

Click the green plus sign.

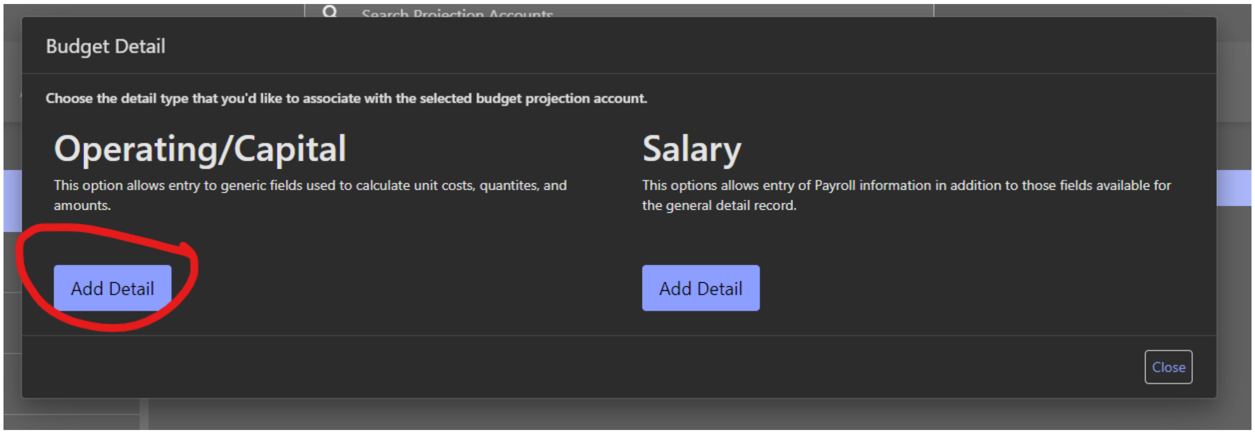
A new screen opens up as “detail screen”.



Click “Add Detail”.

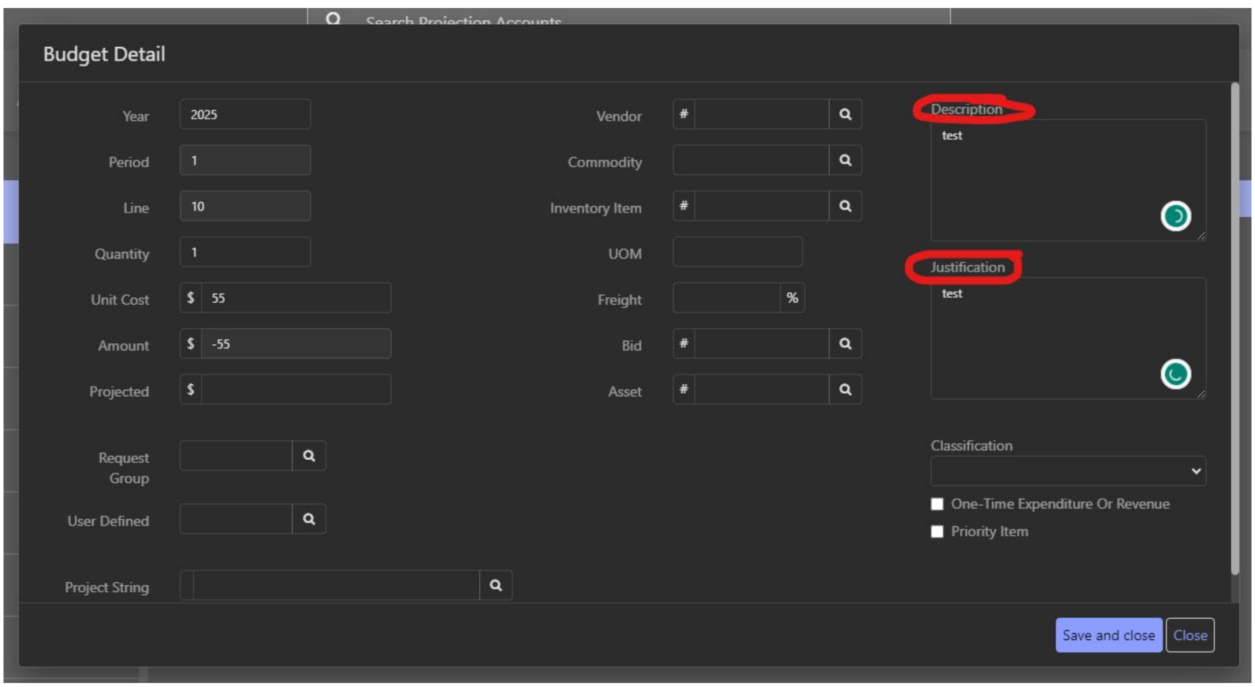


Click “Add Detail” Under “Operating/Capital”:

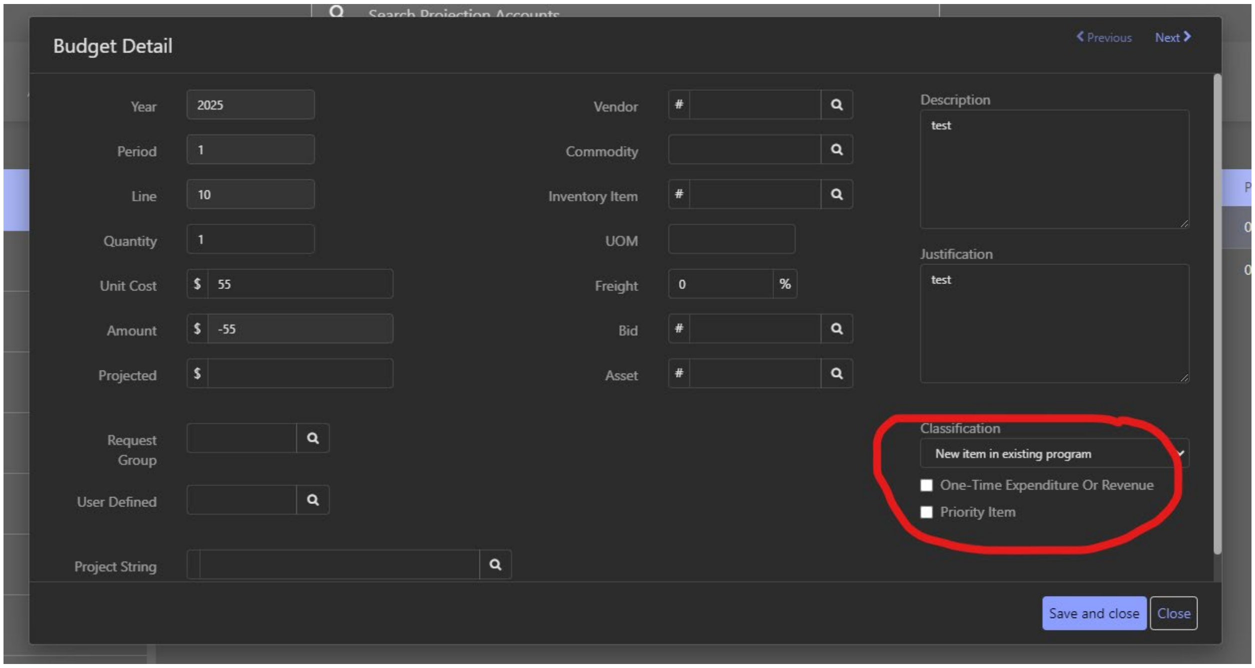


Quantity, Unit cost, description, and justification are the main fields to fill out. The other information is good but not tied to anything.

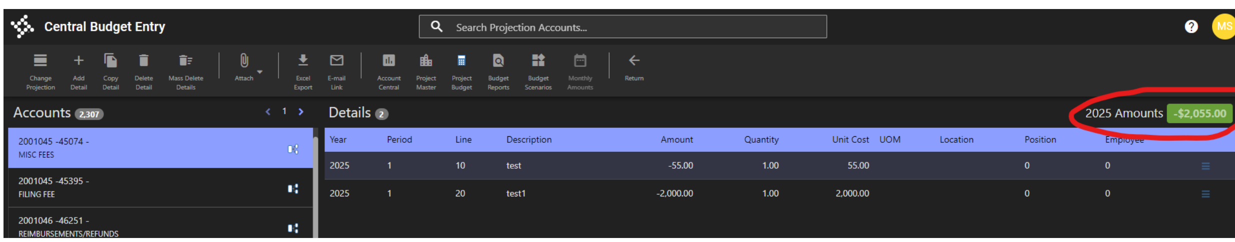
Be sure to enter details in the “Description” box. If there are major changes in requested amounts, please use the “Justification” box.



The one-Time Expenditure or Revenue button does not roll over.

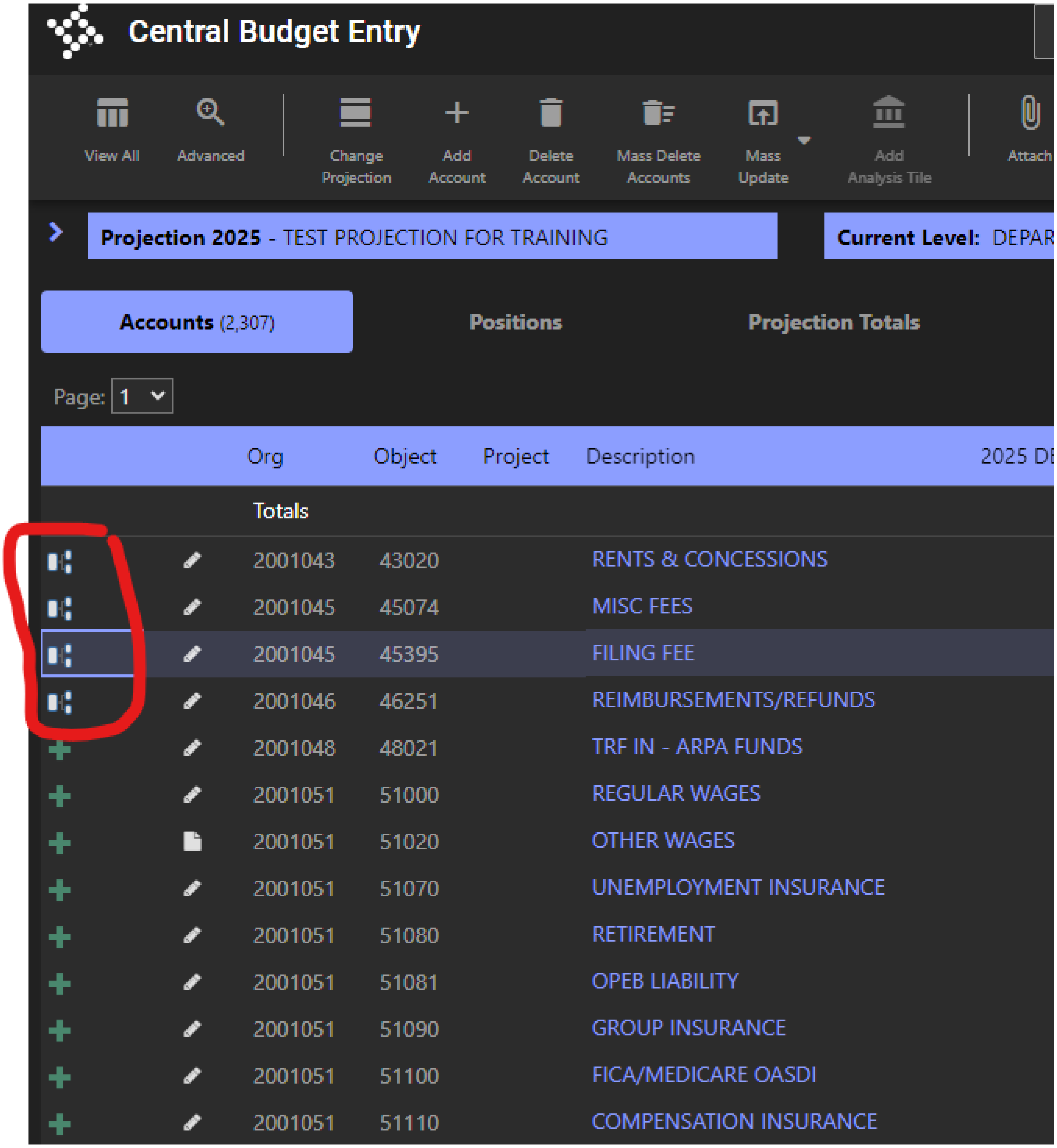


Add lines for each item that makes up the account. The total amount will be in green in the top right.



**Once detail line items are added, they will roll forward to the next budget.*

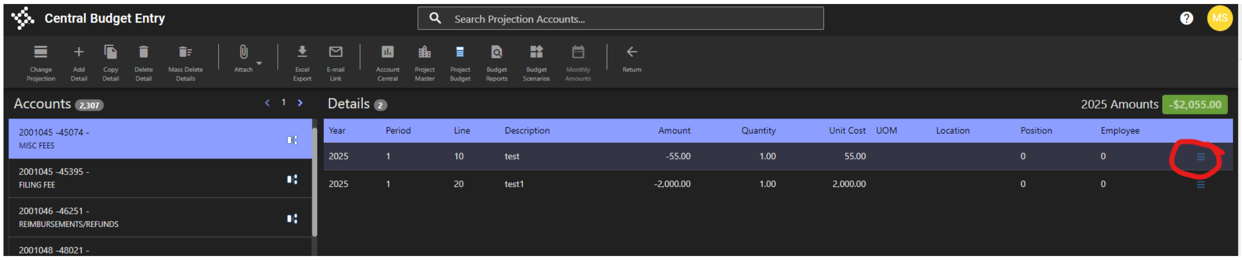
Once detail has been added, the green plus button changes to a different icon.



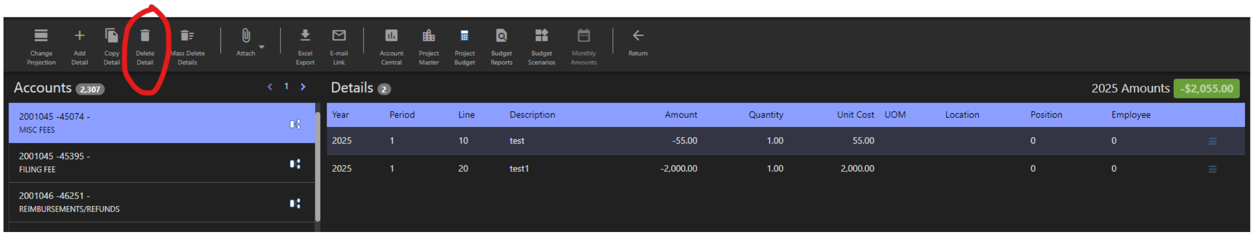
If you need to make changes…

Click the icon that was a green plus sign.

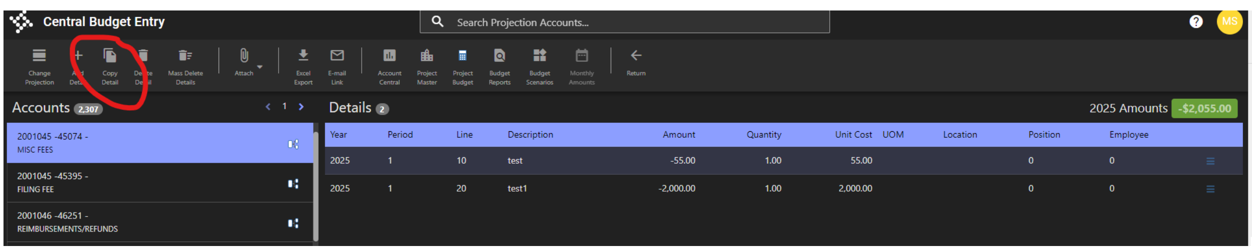
View details, then change the line item. Three lines on the right opens up detail.



Delete detail – highlight the item, and click "Delete detail" at top.



Can also copy details using "copy Detail".



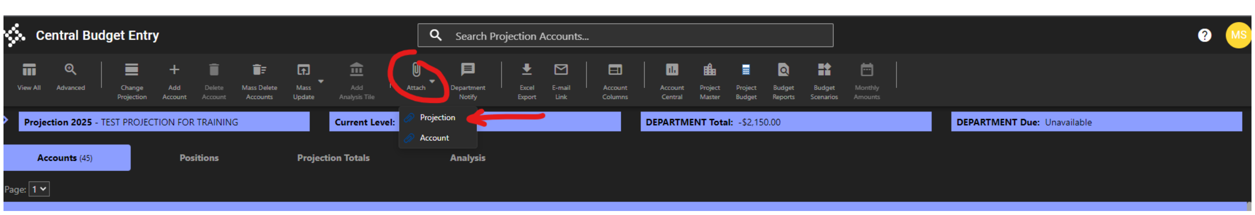
Other things to keep in mind…

Don't use negatives – the system will automatically switch depending on if the account is revenue or expenditure.

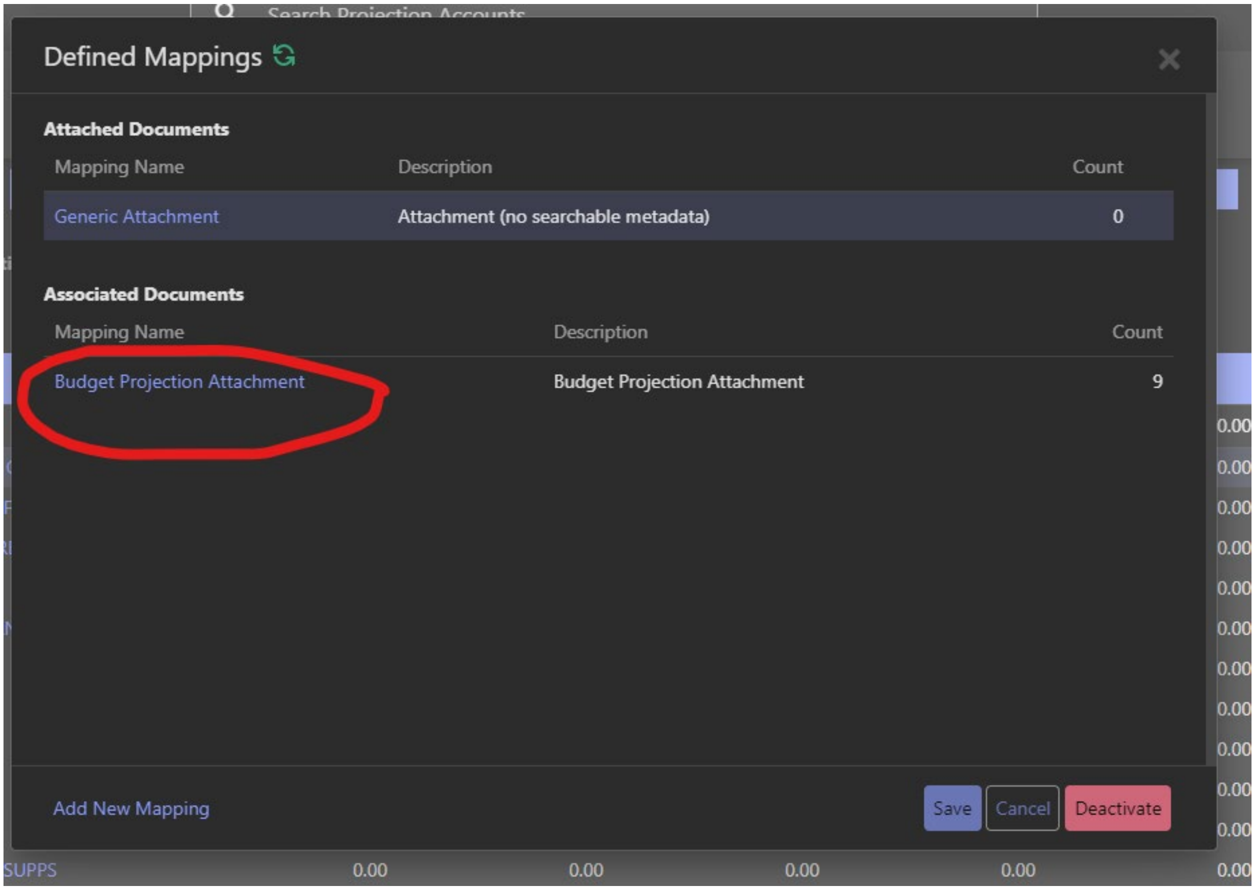
If you use the "Excel export" button, it will pull descriptions and justifications. This can be done any time after the budget is posted. This might be useful to export before budget meetings, each phase.

How to attach documents:

Click the "attachment" button, then "Projection":

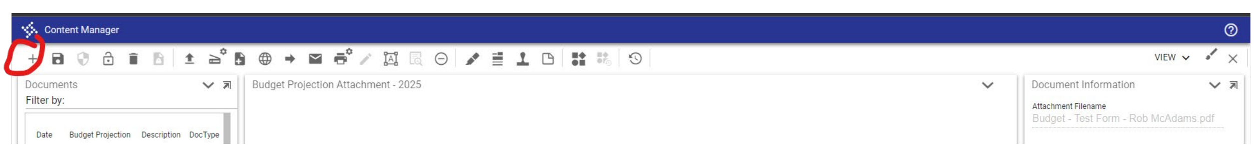


Click “Budget Projections Attachment” from the screen that pops up.



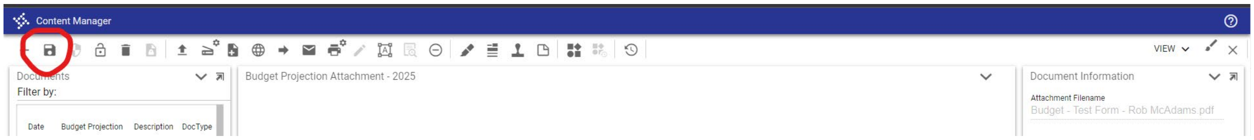
Content manager opens up.

Click the plus sign to create a new document.



Click the import attachment button.

Choose file. (*PDF’s are the best the upload. Word will work, but doesn’t read as well. Word document previews as the document name.)* Notes – add name and department. Click the save document button.



Deleting documents will be permission-dependent.