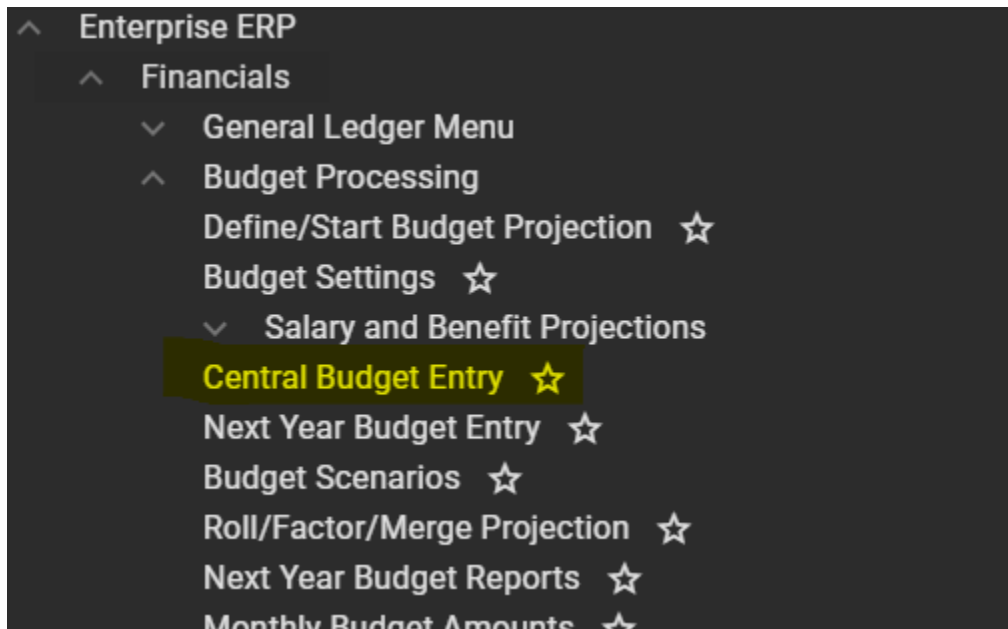
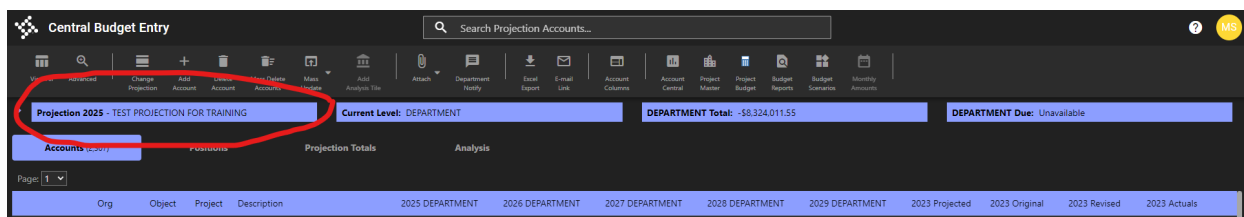


## Central Budget Entry

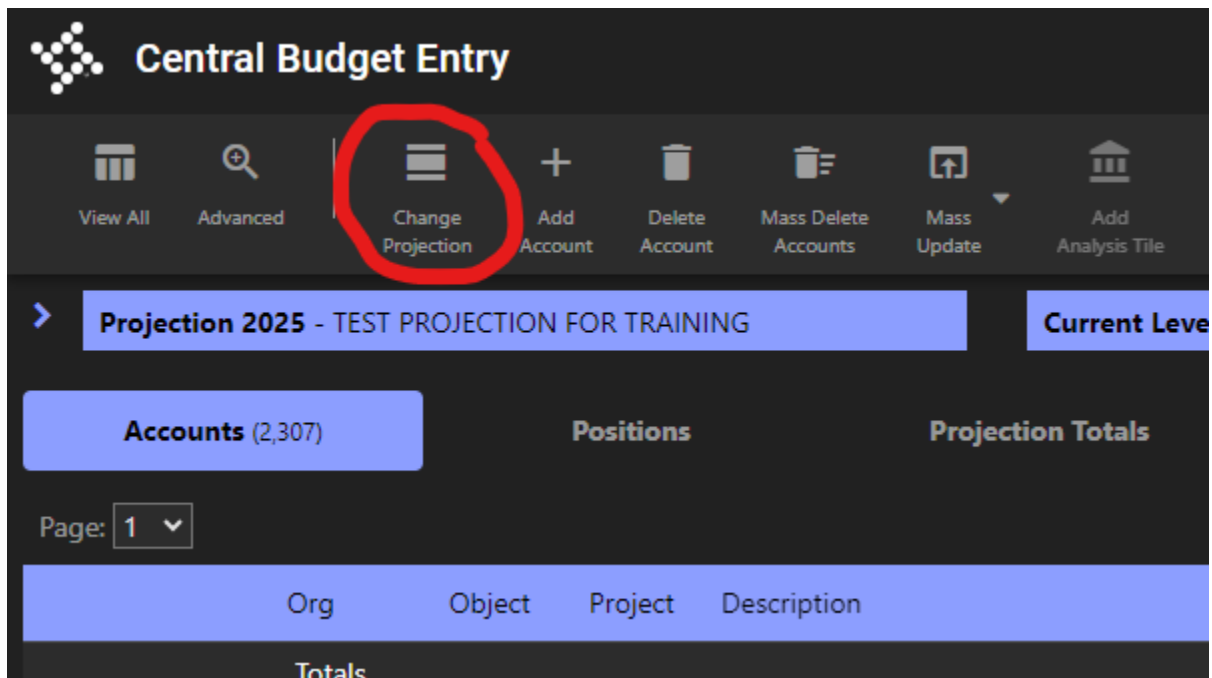
Financials>Budget Processing>Central Budget Entry



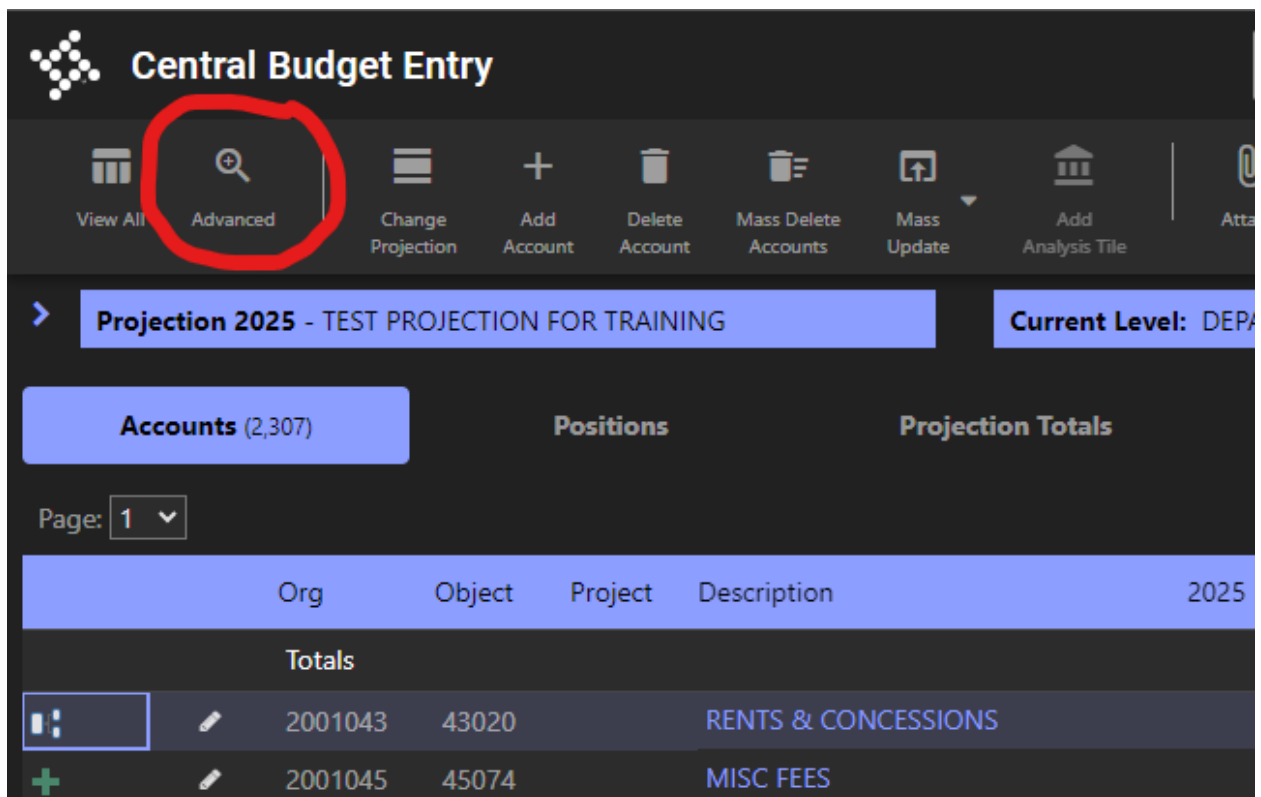
In Central Budget Entry – first, make sure you are in the correct projection.



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:

Search Projection Accounts

### Projection Accounts

Define the working findset by entering projection related information in the fields that apply.

Org	<input type="text"/>	<input type="button" value="Q"/>	Fund	<input type="text"/>	<input type="button" value="Q"/>
Object	<input type="text"/>	<input type="button" value="Q"/>	Sub-Fund	<input type="text"/>	<input type="button" value="Q"/>
GL Project	<input type="text"/>	<input type="button" value="Q"/>	Function	<input type="text"/>	<input type="button" value="Q"/>
Character Code	<input type="text"/>	<input type="button" value="Q"/>	Department	<input type="text"/>	<input type="button" value="Q"/>
Rollup Code	<input type="text"/>	<input type="button" value="Q"/>	Activity	<input type="text"/>	<input type="button" value="Q"/>
Account Type	<input type="text"/>	<input type="button" value="v"/>	Class	<input type="text"/>	<input type="button" value="Q"/>
Account Status	<input type="text"/>	<input type="button" value="v"/>	Future1	<input type="text"/>	<input type="button" value="Q"/>
			Future2	<input type="text"/>	<input type="button" value="Q"/>

Ok Reset Close

**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.

**Central Budget Entry** Search Projection Accounts...

View All Advanced Change Projection Add Account Delete Account Mass Delete Accounts Mass Update Add Analysis Tile Attach Department Notify Excel Export E-mail Link Account Columns

**Projection 2025 - TEST PROJECTION FOR TRAINING** **Current Level: DEPARTMENT**

Accounts (2,307) Positions Projection Totals Analysis

Page: 1

Org	Object	Project	Description	2025 DEPARTMENT	2026 DEPARTMENT	2027 DEPARTMENT
Totals				-8,324,011.55	0.00	
2001043	43020		RENTS & CONCESSIONS	0.00	0.00	
2001045	45074		MISC FEES	-225.00	0.00	
2001045	45395		FILING FEE	0.00	0.00	
2001046	46251		REIMBURSEMENTS/REFUNDS	-5,200.00	0.00	
2001048	48021		TRF IN - ARPA FUNDS	-500.00	0.00	
2001051	51000		REGULAR WAGES	350,000.00	0.00	
2001051	51020		OTHER WAGES	6,000.00	0.00	
2001051	51070		UNEMPLOYMENT INSURANCE	0.00	0.00	
2001051	51080		RETIREMENT	1,100.00	0.00	
2001051	51081		OPEB LIABILITY	0.00	0.00	
2001051	51090		GROUP INSURANCE	0.00	0.00	
2001051	51100		FICA/MEDICARE OASDI	0.00	0.00	
2001051	51110		COMPENSATION INSURANCE	0.00	0.00	
2001051	51120		CELL PHONE ALLOW	0.00	0.00	
2001051	51150		LIFE INSURANCE	0.00	0.00	
2001052	520201		PHONE - LAND LINE (S)	800.00	0.00	
2001052	520210		POSTAGE/SHIP MAIL COST	64.00	0.00	

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

**Central Budget Entry** Search Projection Accounts... MS

View All Advanced Change Projection Add Account Delete Account Mass Delete Accounts Mass Update Add Analysis Tile Attach Department Notify Excel Export E-mail Link Account Columns Account Central Project Master Project Budget Budget Reports Budget Scenarios Monthly Amounts

**Projection 2025 - TEST PROJECTION FOR TRAINING** **Current Level: DEPARTMENT** **DEPARTMENT Total: -\$8,324,011.55** **DEPARTMENT Due: Unavailable**

Accounts (2,307) Positions Projection Totals Analysis

Page: 1

Org	Object	Project	Description	2025 DEPARTMENT	2026 DEPARTMENT	2027 DEPARTMENT	2028 DEPARTMENT	2029 DEPARTMENT	2030 Projected	2030 Original	2030 Revised	2030 Actuals
Totals				-8,324,011.55	0.00	0.00	0.00	0.00	3,152,192.18	3,152,192.18	3,974,968.46	-3,572,879.94
2001043	43020		RENTS & CONCESSIONS	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2001045	45074		MISC FEES	-225.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2001045	45395		FILING FEE	0.00	0.00	0.00	0.00	0.00	-200.00	-200.00	-200.00	-70.00
2001046	46251		REIMBURSEMENTS/REFUNDS	-5,200.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2001048	48021		TRF IN - ARPA FUNDS	-500.00	0.00	0.00	0.00	0.00	-540,000.00	-540,000.00	-540,000.00	0.00
2001051	51000		REGULAR WAGES	350,000.00	0.00	0.00	0.00	0.00	362,354.55	362,354.55	362,354.55	387,974.17
2001051	51020		OTHER WAGES	6,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	202.50
2001051	51070		UNEMPLOYMENT INSURANCE	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500.00
2001051	51080		RETIREMENT	1,100.00	0.00	0.00	0.00	0.00	50,959.69	50,959.69	50,959.69	19,009.40
2001051	51081		OPEB LIABILITY	0.00	0.00	0.00	0.00	0.00	11,999.00	11,999.00	11,999.00	14,269.00
2001051	51090		GROUP INSURANCE	0.00	0.00	0.00	0.00	0.00	50,973.84	50,973.84	50,973.84	73,483.14
2001051	51100		FICA/MEDICARE OASDI	0.00	0.00	0.00	0.00	0.00	28,500.43	28,500.43	28,500.43	30,409.32
2001051	51110		COMPENSATION INSURANCE	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12,278.32
2001051	51120		CELL PHONE ALLOW	0.00	0.00	0.00	0.00	0.00	5,400.00	5,400.00	5,400.00	5,360.00
2001051	51150		LIFE INSURANCE	0.00	0.00	0.00	0.00	0.00	1,838.88	1,838.88	1,838.88	1,792.51
2001052	520201		PHONE - LAND LINE (S)	800.00	0.00	0.00	0.00	0.00	792.00	792.00	792.00	267.01
2001052	520210		POSTAGE/SHIP MAIL COST	64.00	0.00	0.00	0.00	0.00	64.00	64.00	64.00	64.00

**Save Changes** **Cancel**

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

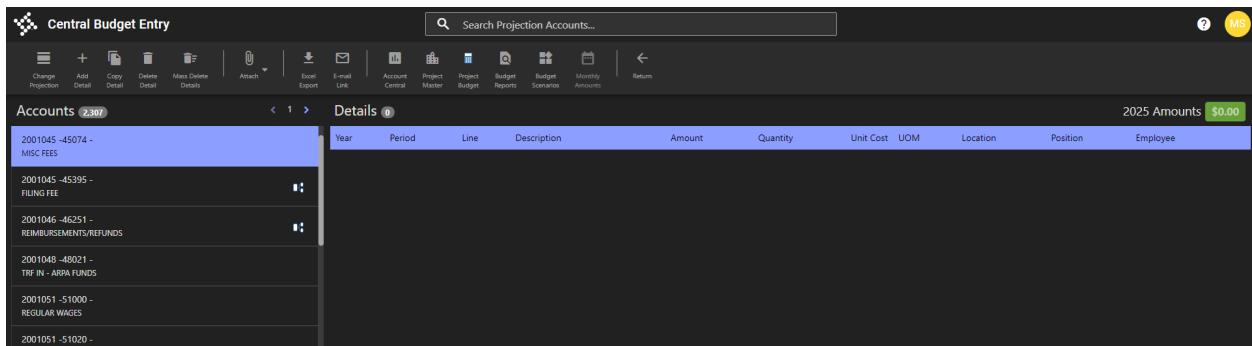
Click the green plus sign.



A screenshot of a list of budget items. The first item, 'TRF IN - ARPA FUNDS' with amount '-500.00', has a green plus sign in its first column circled in red. The list continues with 'REGULAR WAGES' (350,000.00), 'OTHER WAGES' (6,000.00), 'UNEMPLOYMENT INSURANCE' (0.00), 'RETIREMENT' (1,100.00), 'OPEB LIABILITY' (0.00), 'GROUP INSURANCE' (0.00), 'FICA/MEDICARE OASDI' (0.00), and 'COMPENSATION INSURANCE' (0.00). Each item has a green plus sign in the first column and a pencil icon in the second column.

+		2001048	48021	TRF IN - ARPA FUNDS	-500.00
+		2001051	51000	REGULAR WAGES	350,000.00
+		2001051	51020	OTHER WAGES	6,000.00
+		2001051	51070	UNEMPLOYMENT INSURANCE	0.00
+		2001051	51080	RETIREMENT	1,100.00
+		2001051	51081	OPEB LIABILITY	0.00
+		2001051	51090	GROUP INSURANCE	0.00
+		2001051	51100	FICA/MEDICARE OASDI	0.00
+		2001051	51110	COMPENSATION INSURANCE	0.00

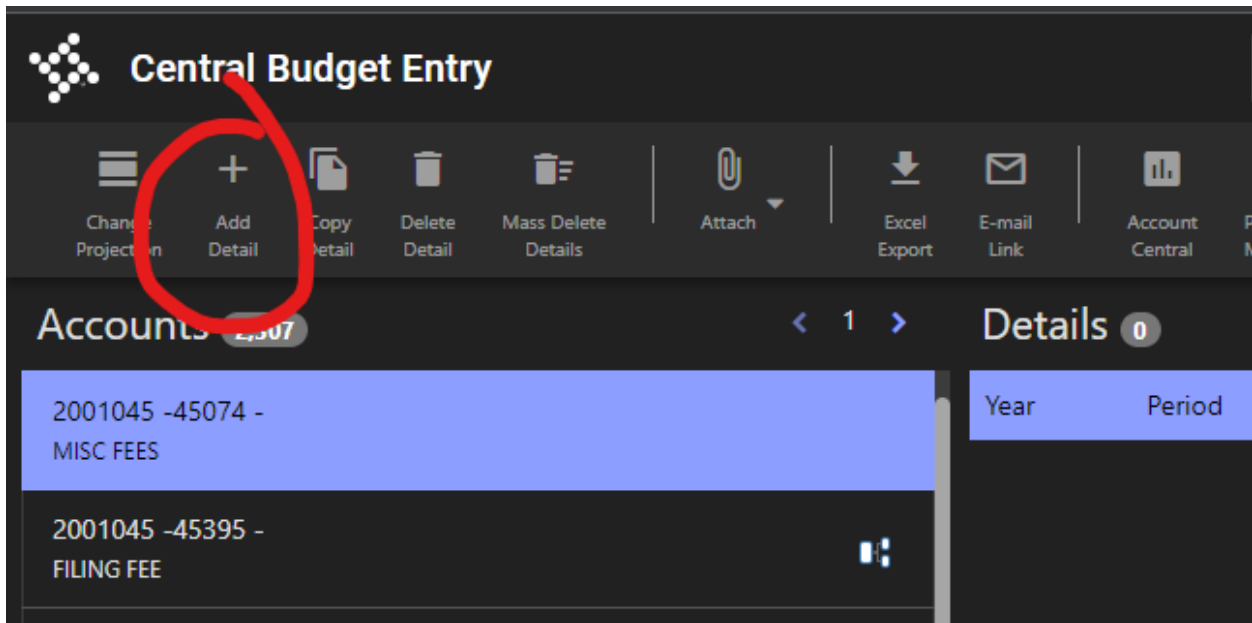
A new screen opens up as “detail screen”.



A screenshot of the 'Central Budget Entry' detail screen. The top bar shows 'Central Budget Entry' and a search bar. Below is a toolbar with icons for 'Change Projection', 'Add Detail', 'Copy Detail', 'Delete Detail', 'Mass Delete Details', 'Attach', 'Excel Export', 'E-mail Link', 'Account Central', 'Project Master', 'Project Budget', 'Budget Reports', 'Budget Scenarios', 'Monthly Accounts', and 'Return'. The main area is split into 'Accounts' (left) and 'Details' (right). The 'Accounts' list includes '2001045 -45074 - MISC FEES', '2001045 -45395 - FILING FEE', '2001046 -46251 - REIMBURSEMENTS/REFUNDS', '2001048 -48021 - TRF IN - ARPA FUNDS', '2001051 -51000 - REGULAR WAGES', and '2001051 -51020 -'. The 'Details' table has columns: Year, Period, Line, Description, Amount, Quantity, Unit Cost, UOM, Location, Position, Employee. The top right shows '2025 Amounts \$0.00'.

Accounts	Details
2001045 -45074 - MISC FEES	Year Period Line Description Amount Quantity Unit Cost UOM Location Position Employee
2001045 -45395 - FILING FEE	
2001046 -46251 - REIMBURSEMENTS/REFUNDS	
2001048 -48021 - TRF IN - ARPA FUNDS	
2001051 -51000 - REGULAR WAGES	
2001051 -51020 -	

Click “Add Detail”.



A screenshot of the 'Central Budget Entry' detail screen. The 'Add Detail' button in the toolbar is circled in red. The 'Accounts' list on the left shows '2001045 -45074 - MISC FEES' and '2001045 -45395 - FILING FEE'. The 'Details' table on the right has columns 'Year' and 'Period'.

Accounts	Details
2001045 -45074 - MISC FEES	Year Period
2001045 -45395 - FILING FEE	

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

**Budget Detail**

Choose the detail type that you'd like to associate with the selected budget projection account.

### Operating/Capital

This option allows entry to generic fields used to calculate unit costs, quantites, and amounts.

**Add Detail**

### Salary

This options allows entry of Payroll information in addition to those fields available for the general detail record.

**Add Detail**

**Close**

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.

**Budget Detail**

Search Projection Accounts

Year	2025	Vendor	#	Q	<b>Description</b>
Period	1	Commodity		Q	test
Line	10	Inventory Item	#	Q	
Quantity	1	UOM			
Unit Cost	\$ 55	Freight		%	<b>Justification</b>
Amount	\$ -55	Bid	#	Q	test
Projected	\$	Asset	#	Q	
Request Group					Classification
User Defined					
Project String				Q	

☐ One-Time Expenditure Or Revenue  
☐ Priority Item

**Save and close** **Close**

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

**Budget Detail** < Previous Next >

Year	2025	Vendor	#	<input type="text"/>	Q	Description test
Period	1	Commodity		<input type="text"/>	Q	
Line	10	Inventory Item	#	<input type="text"/>	Q	Justification test
Quantity	1	UOM		<input type="text"/>		
Unit Cost	\$ 55	Freight	0	<input type="text"/>	%	
Amount	\$ -55	Bid	#	<input type="text"/>	Q	
Projected	\$	Asset	#	<input type="text"/>	Q	
Request Group	<input type="text"/>					<b>Classification</b> <input checked="" type="checkbox"/> New item in existing program <input type="checkbox"/> One-Time Expenditure Or Revenue <input type="checkbox"/> Priority Item
User Defined	<input type="text"/>					
Project String	<input type="text"/>					

Save and close Close

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

Central Budget Entry

Search Projection Accounts...

MS

Change Projection

Add Detail

Copy Detail

Delete Detail

Mass Delete Details

Attach

Excel Export

E-mail Link

Account Central

Project Master

Project Budget

Budget Reports

Budget Scenarios

Monthly Accounts

Return

Accounts2387

<1>

Details2

2025 Amounts-\$2,055.00

Year	Period	Line	Description	Amount	Quantity	Unit Cost	UOM	Location	Position	Employee
2025	1	10	test	-55.00	1.00	55.00		0	0	
2025	1	20	test1	-2,000.00	1.00	2,000.00		0	0	

*\*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.

# Central Budget Entry

View All
 Advanced

Change Projection
 Add Account
 Delete Account
 Mass Delete Accounts
 Mass Update
 Add Analysis Tile
 Attach

**Projection 2025 - TEST PROJECTION FOR TRAINING**

**Current Level:** DEPAR

**Accounts** (2,307)
 **Positions**
**Projection Totals**

Page: 1

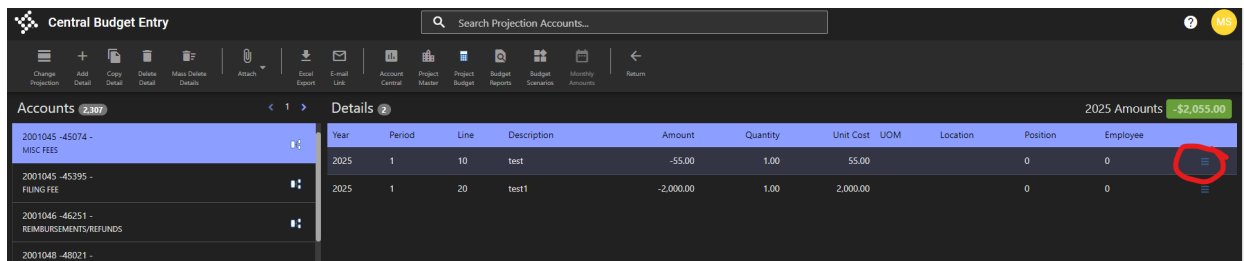
	Org	Object	Project	Description	2025 D
<b>Totals</b>					
		2001043	43020	RENTS & CONCESSIONS	
		2001045	45074	MISC FEES	
		2001045	45395	FILING FEE	
		2001046	46251	REIMBURSEMENTS/REFUNDS	
		2001048	48021	TRF IN - ARPA FUNDS	
		2001051	51000	REGULAR WAGES	
		2001051	51020	OTHER WAGES	
		2001051	51070	UNEMPLOYMENT INSURANCE	
		2001051	51080	RETIREMENT	
		2001051	51081	OPEB LIABILITY	
		2001051	51090	GROUP INSURANCE	
		2001051	51100	FICA/MEDICARE OASDI	
		2001051	51110	COMPENSATION INSURANCE	

If you need to make changes...

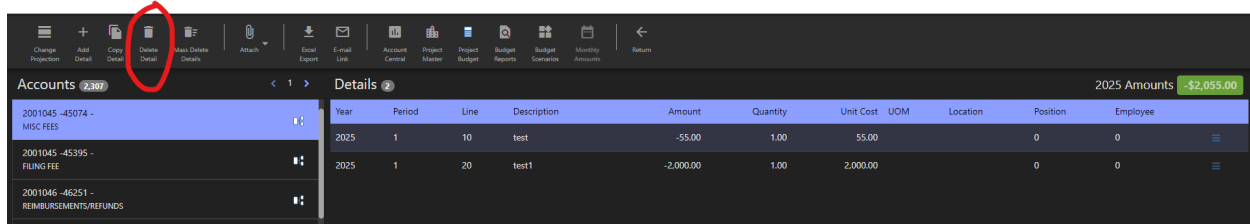
Click the icon that was a green plus sign.

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

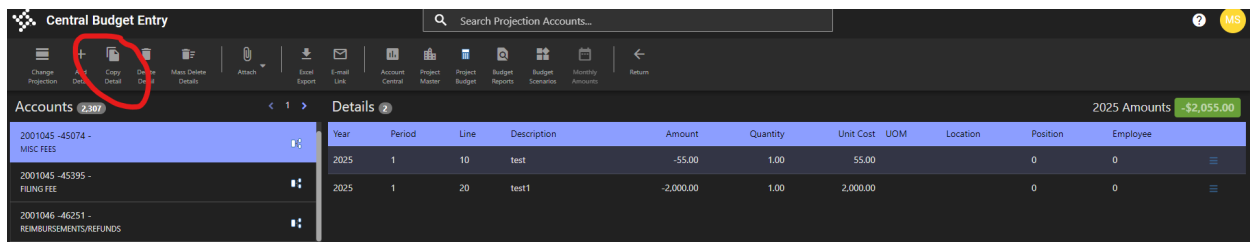




Delete detail – highlight the item, and click “Delete detail” at top.



Can also copy details using “copy Detail”.



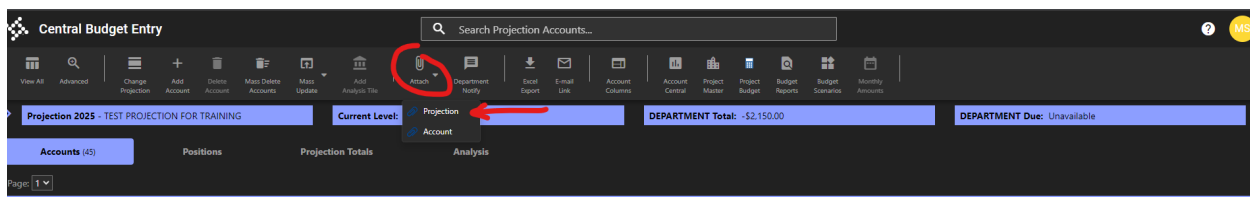
## Other things to keep in mind...

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

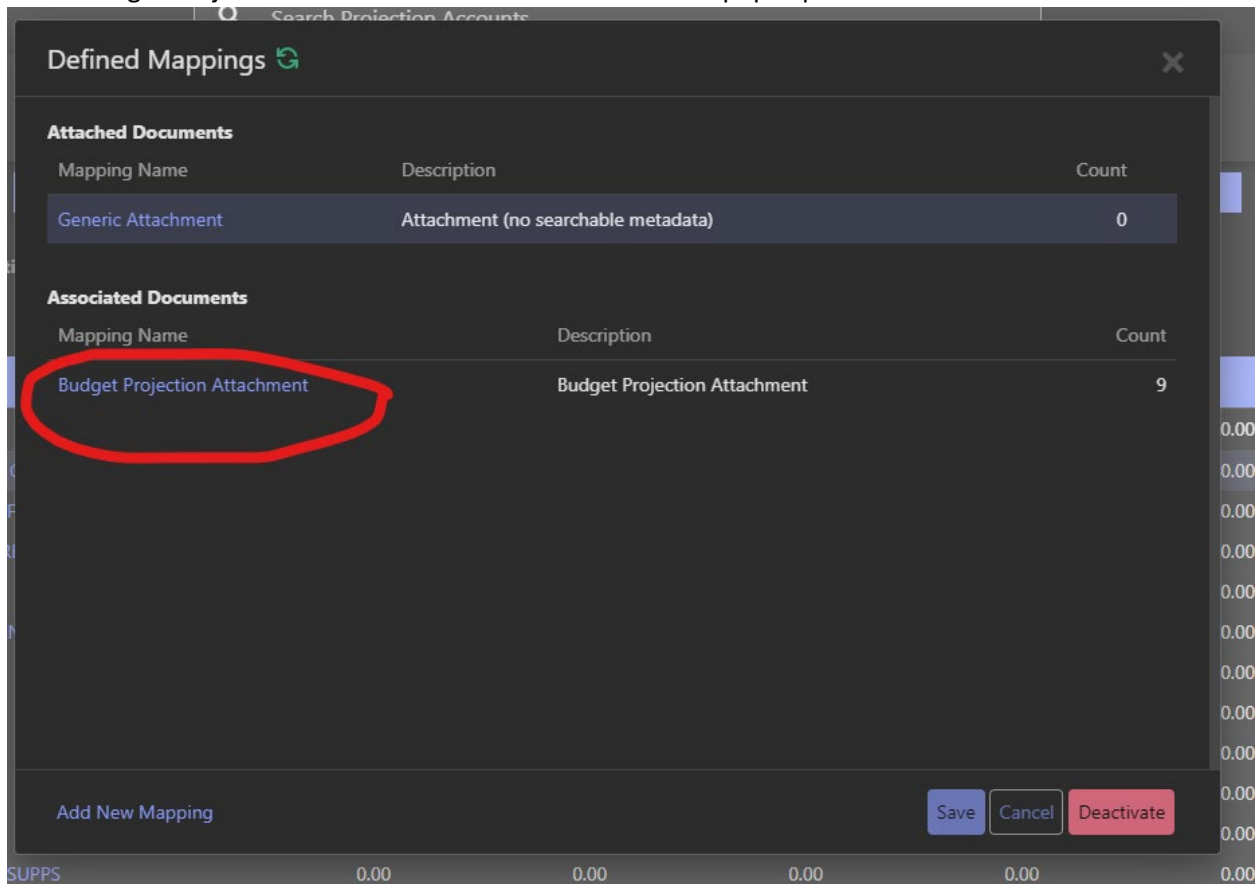
If you use the “Excel export” button, it will pull descriptions and justifications. This can be done any time after the budget is posted. This might be useful to export before budget meetings, each phase.

## How to attach documents:

Click the “attachment” button, then “Projection”:



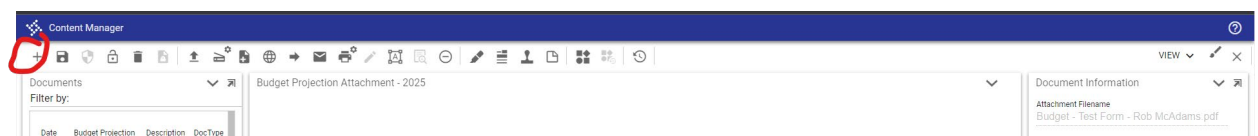
Click “Budget Projections Attachment” from the screen that pops up.



Content manager opens up.



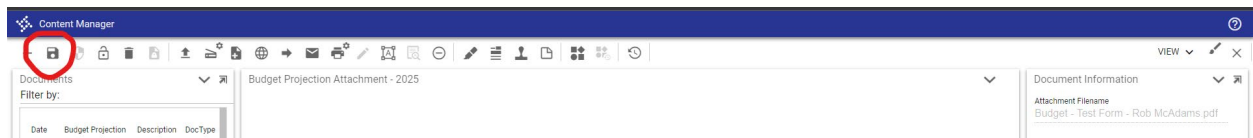
Click the plus sign to create a new document.



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.