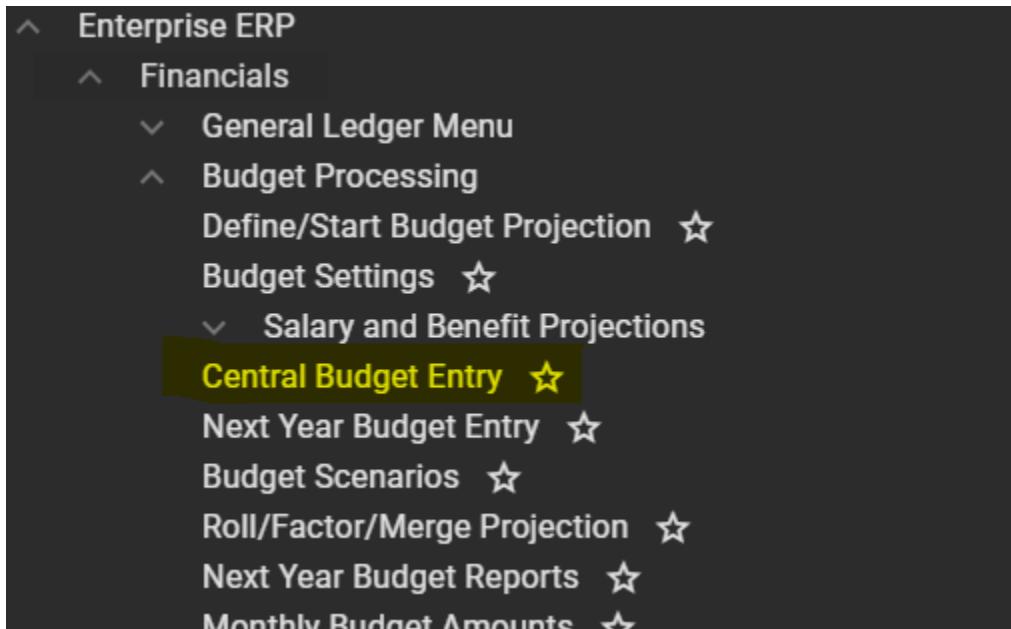
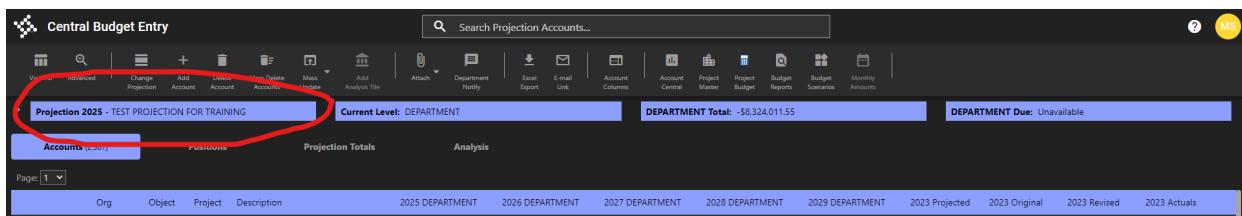


Central Budget Entry

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

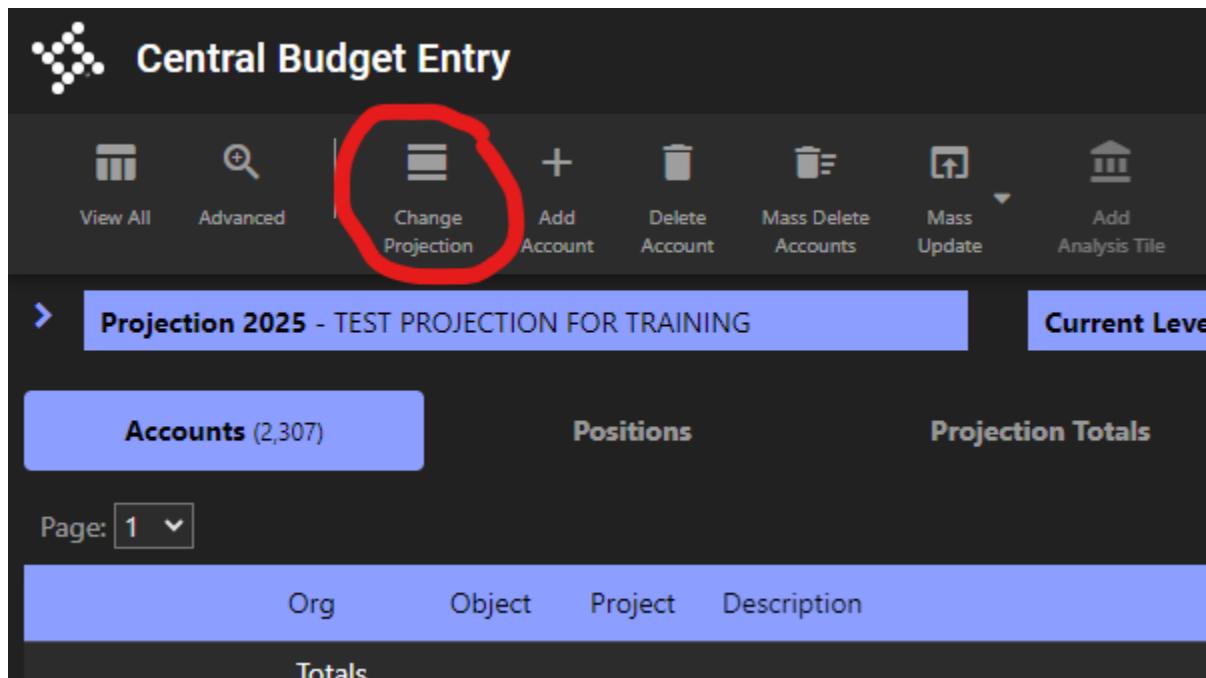


In Central Budget Entry – first, make sure you are in the correct projection.



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

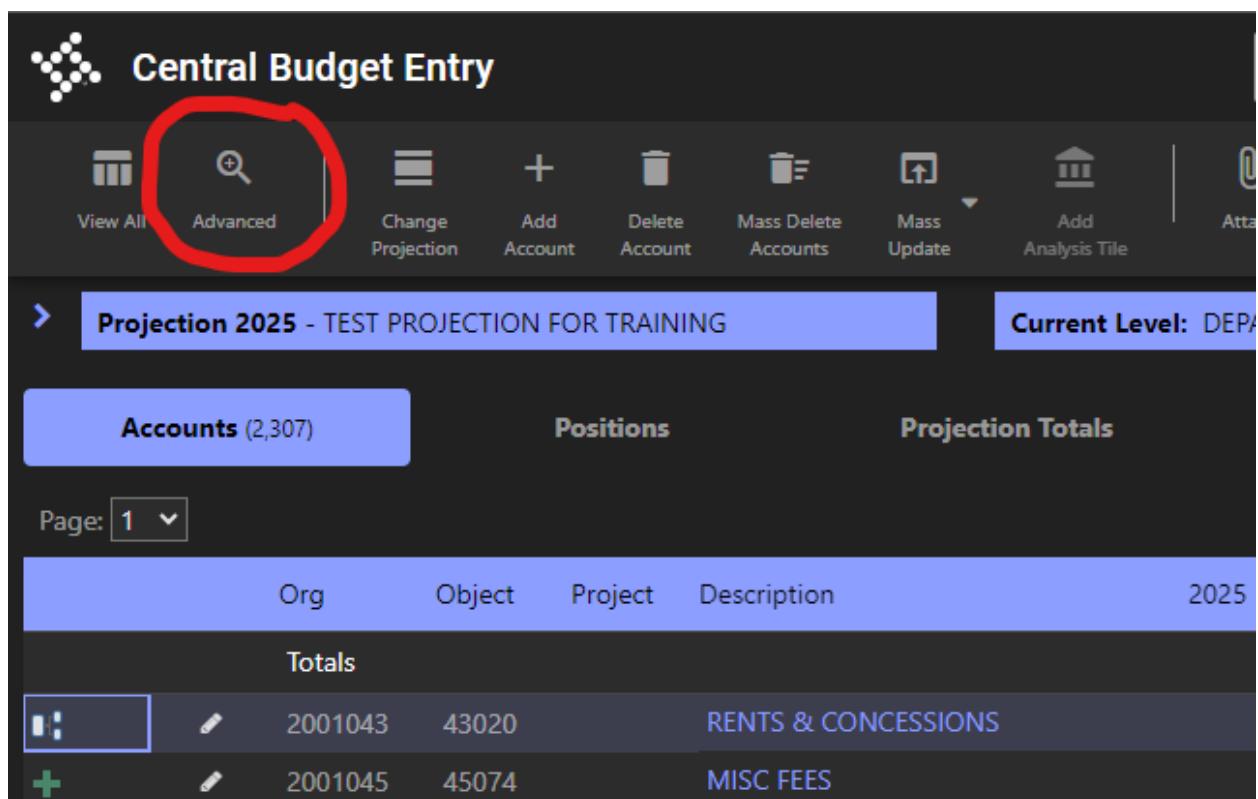
Central Budget Entry



The screenshot shows the 'Central Budget Entry' interface. At the top, there is a toolbar with various buttons: 'View All', 'Advanced' (which is circled in red), 'Change Projection' (also circled in red), 'Add Account', 'Delete Account', 'Mass Delete Accounts', 'Mass Update', and 'Add Analysis Tile'. Below the toolbar, a navigation bar shows the projection 'Projection 2025 - TEST PROJECTION FOR TRAINING' and the 'Current Level' 'DEPA'. The main area is divided into three tabs: 'Accounts (2,307)' (which is highlighted in blue), 'Positions', and 'Projection Totals'. Below these tabs, there is a page number 'Page: 1' and a header with columns 'Org', 'Object', 'Project', and 'Description'. At the bottom, there is a 'Totals' section.

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

Central Budget Entry



The screenshot shows the 'Central Budget Entry' interface. At the top, there is a toolbar with various buttons: 'View All', 'Advanced' (which is circled in red), 'Change Projection', 'Add Account', 'Delete Account', 'Mass Delete Accounts', 'Mass Update', and 'Add Analysis Tile'. Below the toolbar, a navigation bar shows the projection 'Projection 2025 - TEST PROJECTION FOR TRAINING' and the 'Current Level' 'DEPA'. The main area is divided into three tabs: 'Accounts (2,307)' (which is highlighted in blue), 'Positions', and 'Projection Totals'. Below these tabs, there is a page number 'Page: 1' and a header with columns 'Org', 'Object', 'Project', 'Description', and '2025'. At the bottom, there is a 'Totals' section showing two rows of data: one for 'RENTS & CONCESSIONS' with code 2001043 and object 43020, and another for 'MISC FEES' with code 2001045 and object 45074.

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="▼"/>	Class	<input type="text"/>	<input type="button" value="q"/>
Account Status	<input type="text"/>	<input type="button" value="▼"/>	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 DE
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...

View All Advanced Change Projection Add Account Delete Account Mass Delete Accounts Mass Update Add Analysis Tile Attach Department Notify Project 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	2023 Projected	2023 Original	2023 Revised	2023 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	66.00	66.00	66.00	0.00

< 1 2 3 4 5 > Save Changes Cancel

Detail *this can be especially helpful for the future.

Click the green plus sign.

+	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”.



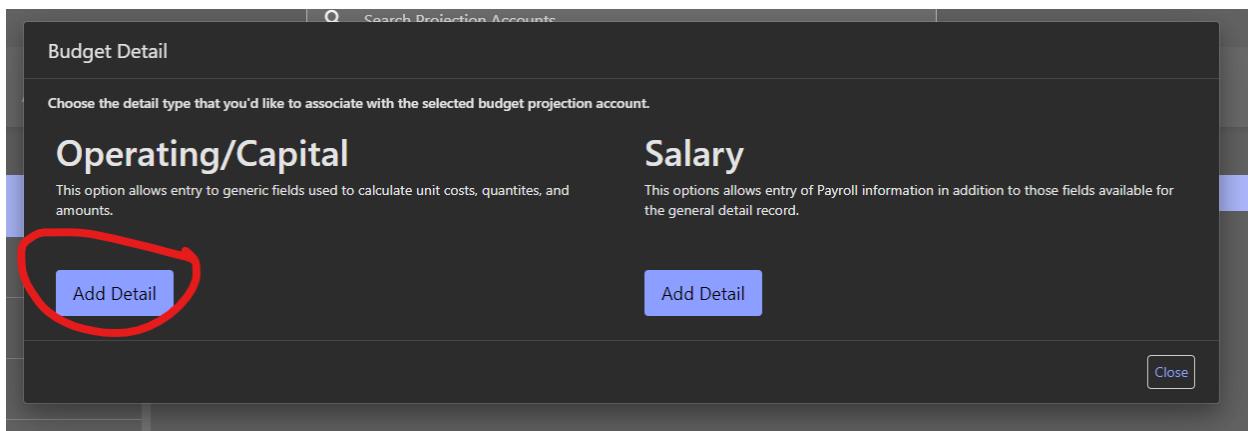
The screenshot shows the 'Central Budget Entry' application interface. The top navigation bar includes a search bar for 'Projection Accounts...', a help icon, and a 'MS' logo. Below the navigation is a toolbar with icons for Change Project, Add Detail, Copy Detail, Delete Detail, Mass Delete Details, Attach, Excel Export, E-mail Link, Account Central, Project Master, Project Budget, Budget Reports, Budget Scenarios, Monthly Amounts, and Return. The main content area is divided into two sections: 'Accounts' (with 300 items) and 'Details' for the selected item. The 'Details' section shows a table with columns: Year, Period, Line, Description, Amount, Quantity, Unit Cost, UOM, Location, Position, and Employee. The selected row in the 'Accounts' list is highlighted in blue and shows the details: 2001045-45074 - MISC FEES. The 'Details' table shows the following data for this item:

Year	Period	Line	Description	Amount	Quantity	Unit Cost	UOM	Location	Position	Employee
2001045-45074			MISC FEES							

Click “Add Detail”.

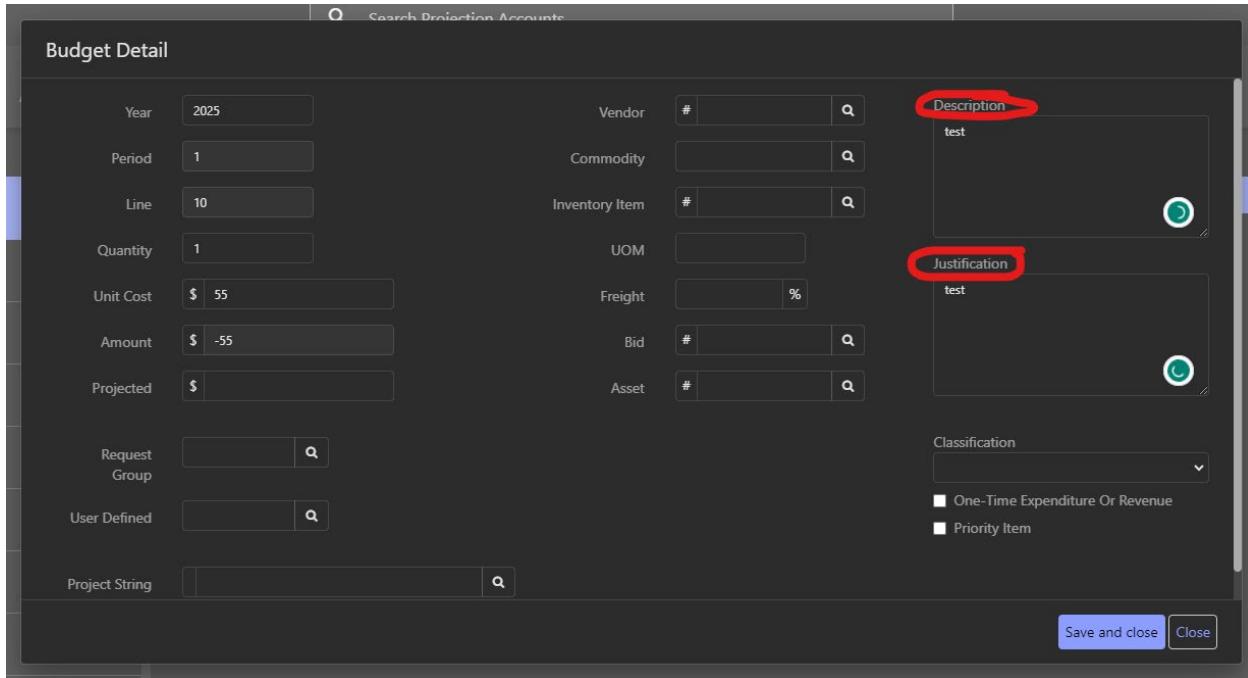
The screenshot shows the 'Central Budget Entry' application interface. The toolbar at the top includes buttons for 'Change Projector', 'Add Detail', 'Copy Detail', 'Delete Detail', 'Mass Delete Details', 'Attach', 'Excel Export', 'E-mail Link', and 'Account Central'. A red circle highlights the 'Add Detail' button. Below the toolbar, a navigation bar shows 'Accounts 2007' on the left and 'Details 0' on the right. The main area displays a list of accounts with two entries visible: '2001045 -45074 - MISC FEES' and '2001045 -45395 - FILING FEE'. A blue header bar is positioned above the account list.

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.

Budget Detail

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

Details										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
Projection 2025 - TEST PROJECTION FOR TRAINING				Current Level: DEPAR		
Accounts (2,307)		Positions		Projection Totals		
Page: 1						2025 D
Totals						
		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.

Central Budget Entry

Search Projection Accounts...

Details

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	≡

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

Central Budget Entry

Search Projection Accounts...

Details

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	≡

Can also copy details using “copy Detail”.

Central Budget Entry

Search Projection Accounts...

Details

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	≡

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”:

Central Budget Entry

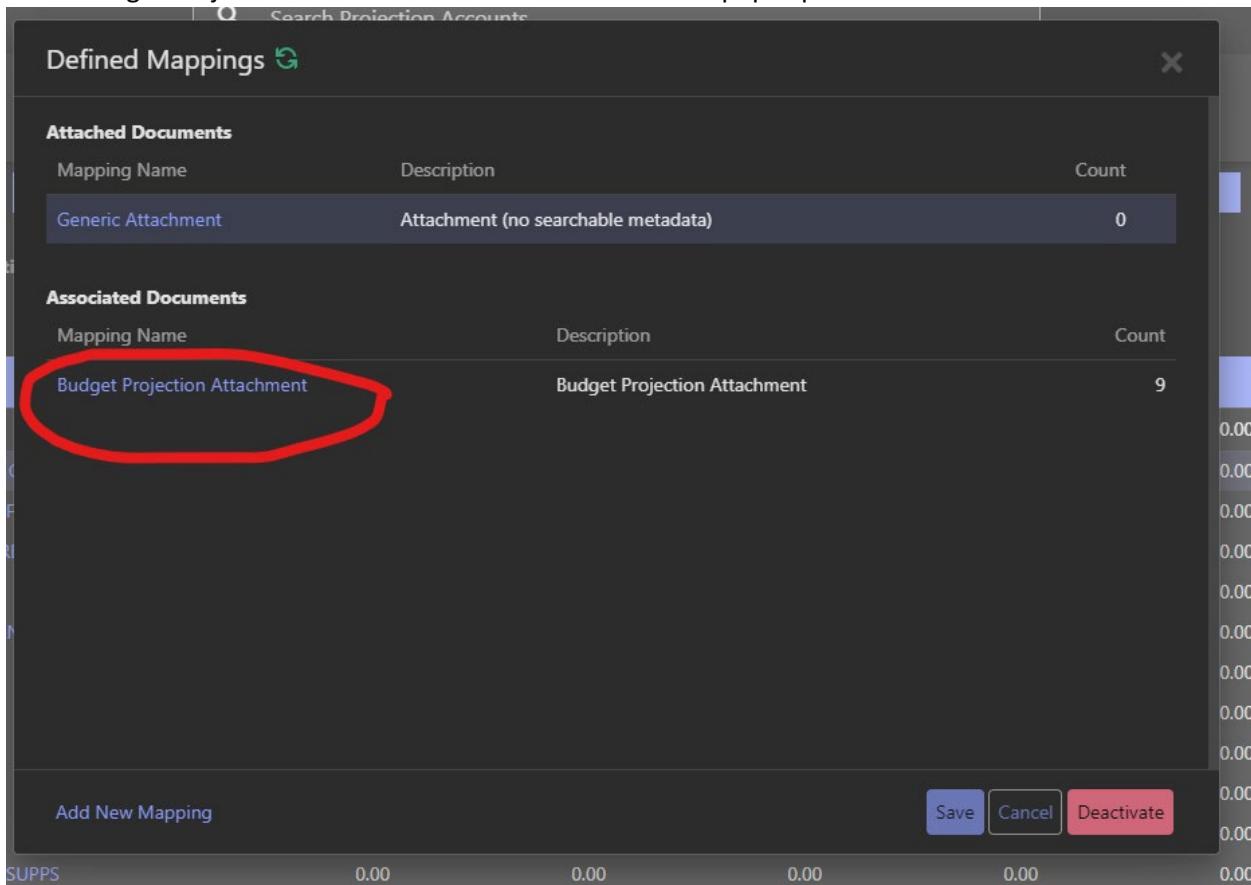
Search Projection Accounts...

Projection

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	≡

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



Mapping Name	Description	Count
Generic Attachment	Attachment (no searchable metadata)	0

Mapping Name	Description	Count
Budget Projection Attachment	Budget Projection Attachment	9

Add New Mapping Save Cancel Deactivate

Content manager opens up.



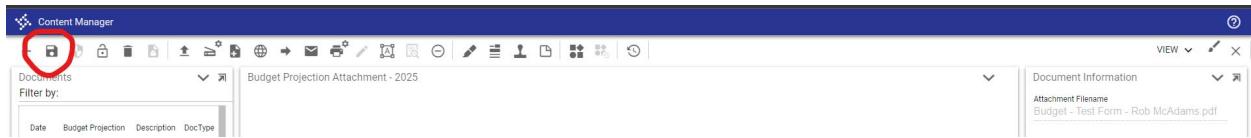
Click the plus sign to create a new document.



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.