

## Skyward Budget Transfer Entry – Updated 09.19.2011

Thank you very much for your patience. You may begin entering budget transfers, using the new system as described below, anytime you are ready. If you have any questions, please feel free to contact Cecy Delacruz, Justin Hill or myself. This new process will actually allow for budget transfers to be approved, by the appropriate person, much timelier and they will be approved based on the information you provide. Please remember we would like to approve transfers on Tuesday of each week.

- 1 Budget Transfer Group is a new drop down menu. I have placed the drop down menu in the example for you. The system did not work exactly how I would have liked it to, but I think we can make it work. Your Budget Transfer Group selection should be based on the account number you are transferring from. *Example: Transfer from 199 E 11 6399 00 XXX 0 11 to 199 E 11 6399 00 XXX 0 30 – Select Budget Transfer Goup 013 (PIC 11 INSTRUCTION).* I believe the drop down options are self explanatory, but remember to make your selection based on the account number you are transferring from. The Group number does not reflect campus or department numbers. It is a Skyward number.
- 2 All other processes are the same. Remember to change the fiscal year to 2011-2012 until the system automatically changes.
- 3 The first description should be BT-XXX (XXX = Your campus or department organization number). This is not new process. Please feel free to add additional information after the required description for your use. This description will print on reports. The description under each account number should be placed in as much detail as possible. Detail will allow the budget transfer approver to make a timely and accurate decision about your request. *Example: To purchase supplemental readingsupplies (workbooks)for reading classes.*

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**Budget Transfers**

\* Budget Transfer Group: 013 PIC 11 INSTRUCTION 1

\* Fiscal Year: 2011 - 2012 2

\* Transfer Type: Expense Rules \* Batch Number: 11-00038

\* Description: BT-001 Purchase supplemental reading supplies-Transferring to PIC 30 3

Amount: 200.00

**Budget Transfer Detail Lines**

Detail Budget Transfer	Transfer Amount	
General Ledger Account Account: 199 E 11 6399 00 001 0 11 000 GENERAL FUND/INSTRUCTION/GENERAL SUPPLIE/REC Description: To purchase supplemental supplies (workbooks) for reading classes. <span style="float: right;">3</span>	Transfer From	100.00
	Debit Amount	0.00
	Credit Amount	100.00
General Ledger Account Account: 199 E 11 6399 00 001 0 30 000 GENERAL FUND/INSTRUCTION/GENERAL SUPPLIE/REC Description: To purchase supplemental supplies (workbooks) for reading classes. <span style="float: right;">3</span>	Transfer From	100.00
	Debit Amount	0.00
	Credit Amount	100.00
General Ledger Account Account: Description:	Transfer From	0.00
	Debit Amount	0.00
	Credit Amount	0.00
General Ledger Account Account: Description:	Transfer From	0.00
	Debit Amount	0.00
	Credit Amount	0.00

Asterisk (\*) denotes a required field

Group	Group Description
001	PIC 24 EXPENDITURES <span style="float: right;">1</span>
002	PIC 30 EXPENDITURES
003	PIC 91 EXPENDITURES
004	PIC XX SO 21 BAND EXPENDITURES
005	PIC 25 ESL SECONDARY SCHOOLS E
006	PIC 25 BIL ELEMENTARY SCHOOLS
007	PIC 25 ESL SECONDARY
008	FUND 101 & 242 CNP
009	PIC 31 COLLEGE READINESS
010	PIC 22 CATE
011	FUND 274 GEAR UP
012	PIC 21 GT
013	PIC 11 INSTRUCTION
014	FUNCTION 12 LIBRARY
015	FUNCTION 51 M/O
016	FUNCTION 33 NURSES
017	PIC 32 PRE K
018	PIC 23 SPECIAL EDUCATION
019	FUNCTION 23 SCHOOL LEADERSHIP
099	DO NOT USE