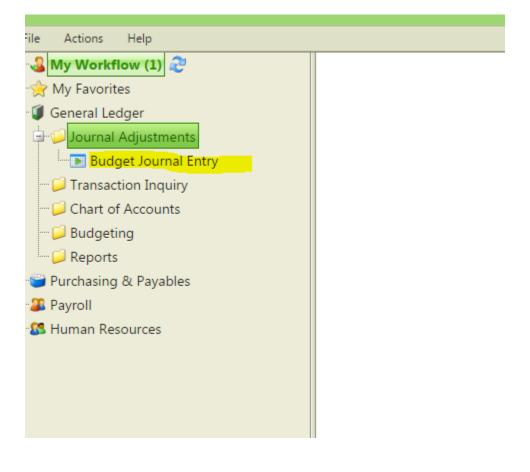
How to Make a Budget Adjustment on the Tyler Portal

Recently the following question was posed to us? I only have \$10,000 in computer equipment expense in the budget and am making a \$13,000 computer equipment purchase so can I charge the \$3,000 cost over budget between supplies and books where budget money is available?

Although the intention to stay in budget is appreciated, items purchased must be coded to the correct function and object codes per accounting regulations for schools. It is not permissible to charge computer equipment to supplies and books. Furthermore charging expenses this way does not allow you to look at historical spending for specific items with any accuracy.

In order to make the \$13,000 purchase in the example above, a budget adjustment would be made to move funds from supplies and books, into computer equipment before processing the requisition. In order to process a budget adjustment in Tyler, see steps below.

Log into workflow and select General Ledger, Journal Adjustments, Budget Journal Entry



Hit the plus sign to add a Budget Journal Entry

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File	Action	ns He	elp					
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	Request	Numbe	r Ha	s Docum	ents	Entry	Ent	ry Date
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No rec	ords to d	isplay.						

Add an explanation in the memo section.

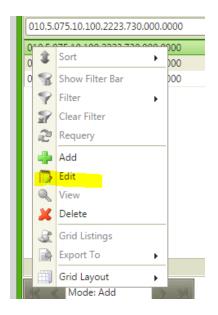
Debit the line item where you want to put additional budget funds and save by hitting file icon. Credit the line item where you want to move budget funds from, where you are reducing the budget, and save by hitting the file icon.

🗊 Add Bu	ıdget Journal Entry					X
Actions	Help					
G/L Date:	6/28/2016		Reference:			•
Memo: Move budget from Supplies			Budget Type:	FY2017 Adj Bu	dget	-
	Computer Equipment to cover purchase		Budget Journal Type:	Adjustment		-
			DAC:			•
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Account		Description	D	ebit	Credit	-0
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010.5.075.1	10.100.2223.730.000.0000	AV/TECH EQUIPMENT		\$3,000.00		\$0.00

G/L Date: 6/28/2010	6 🖽	Reference:	•		-	
Memo: Move bu	Move budget from Supplies and Books to			FY2017 Adj Budget 🔹		-
Compute	er Equipment to cover	Budget Journal Type:	Adjustment	Adjustment		
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Account		Description		Debit	Credit	
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010.5.075.10.100.222	3.730.000.0000	AV/TECH EQUIPMENT		\$3,000.00		\$0.00
010.5.075.10.100.110		REGULAR ED SUPPLY0		\$0.00		00.00
010.5.075.10.100.110	0.640.000.0000	REGULAR ED BOOKS0		\$0.00	\$1,5	00.00
010.5.075.10.100.110	0.640.000.0000	REGULAR ED BOOKSO		\$0.00	\$1,5	20.00

DEBITS AND CREDITS MUST EQUAL IN A BUDGET JOURNAL ENTRY.

You can edit any line before hitting OK and posting the transaction by right click and selecting edit. You can also delete a line item.



Double clicking any line item shows the current status of that account, not including the transaction being entered.

Account Transactio			X			
Account:	010.5.075.10.100.2223.730.000.0000					
Budget:	\$3,000.00	Account Budget:	\$3,000.00			
YTD Transactions:	\$0.00	FTE:	0.0000			
Encumbrances:	\$0.00	Control Group:				
Budget Balance:	\$3,000.00	-				
Pending:	\$9,452.53					
Pending Invoices:	\$0.00					
Uncommitted Balance:	(\$6,452.53)	-	Cancel			

Please contact anyone in the WWSU Fiscal Services Dept. with questions. We are willing to schedule individual training at your convenience. All HUHS Dept. Heads are required to make budget adjustments to keep their Dept.'s expenses within budget. We are setting this out as an expectation for all schools in FY2017 that requisitions put through for processing are within budget.