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
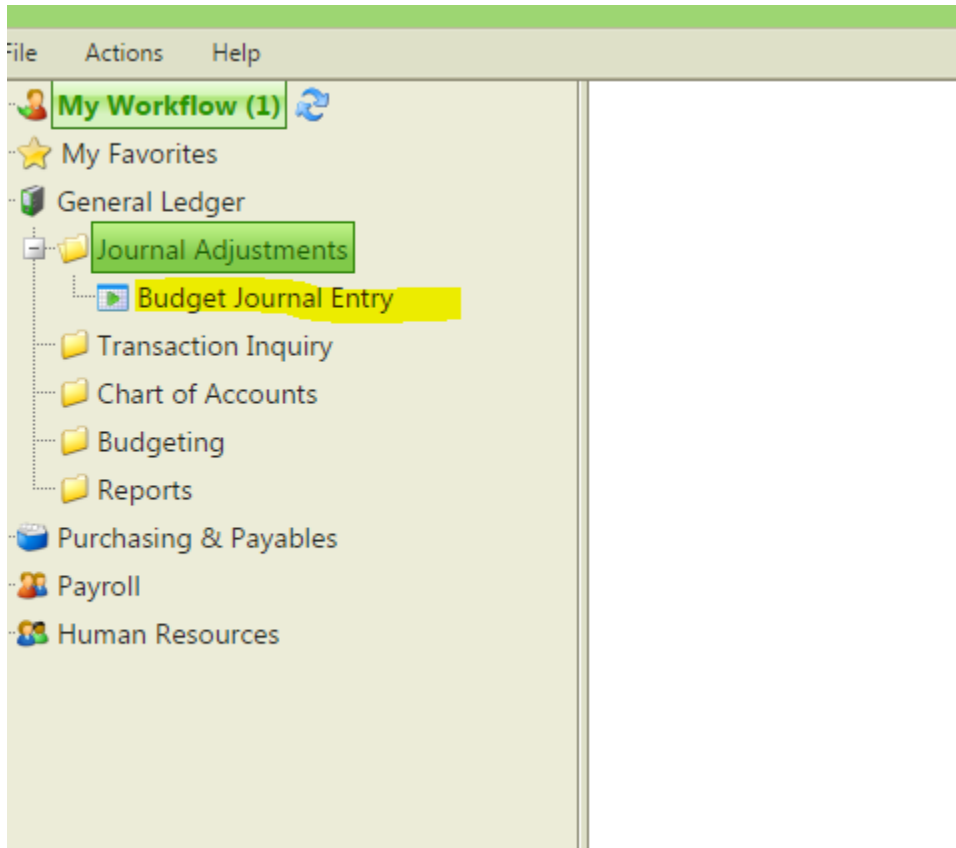
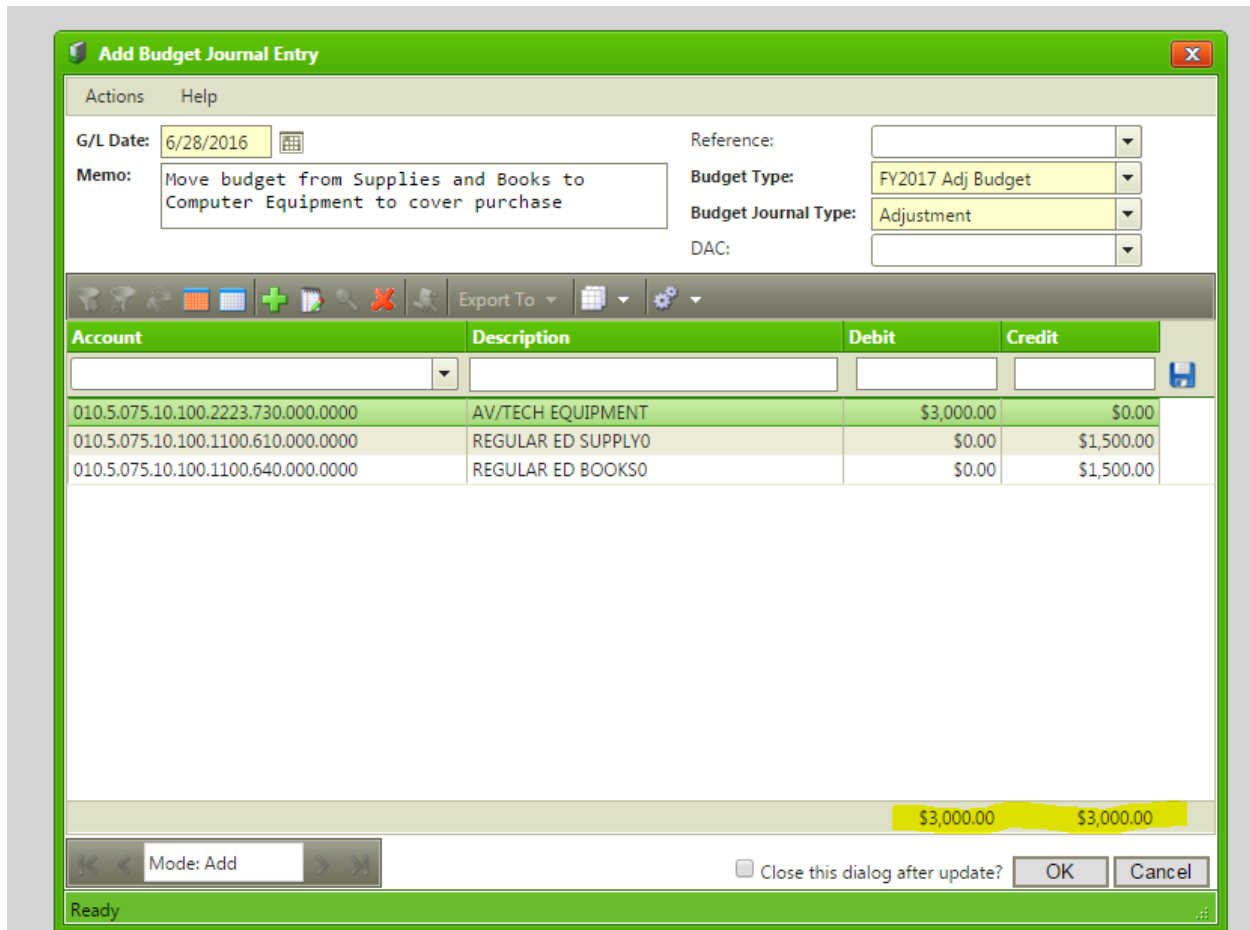Hit the plus sign to add a Budget Journal Entry
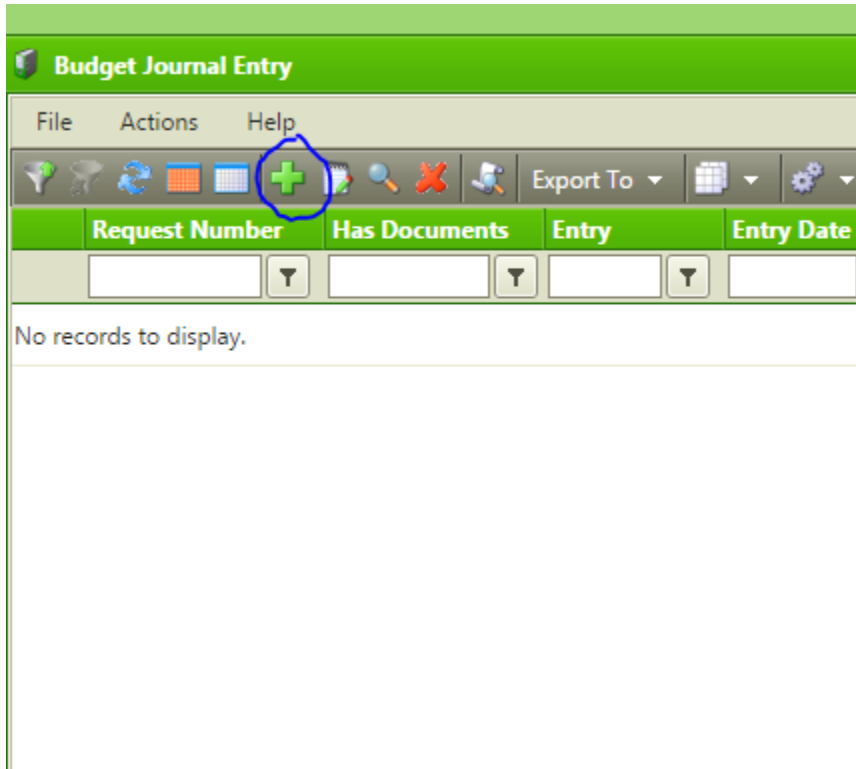
Add an explanation in the memo section.
Debit the line item where you want to put additional budget funds and save by hitting file icon. Credit the line item where you want to move budget funds from, where you are reducing the budget, and save by hitting the file icon.
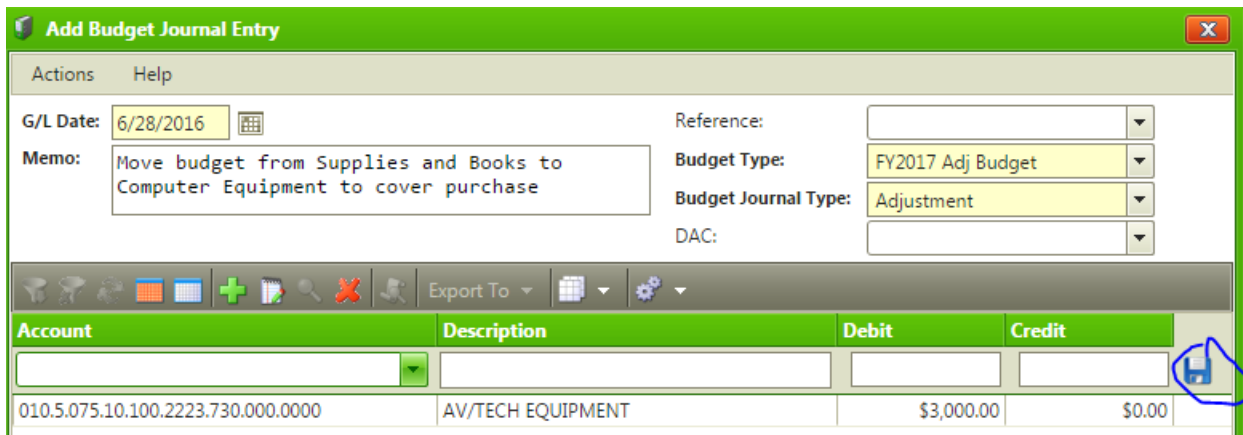
DEBITS AND CREDITS MUST EQUAL IN A BUDGET JOURNAL ENTRY.

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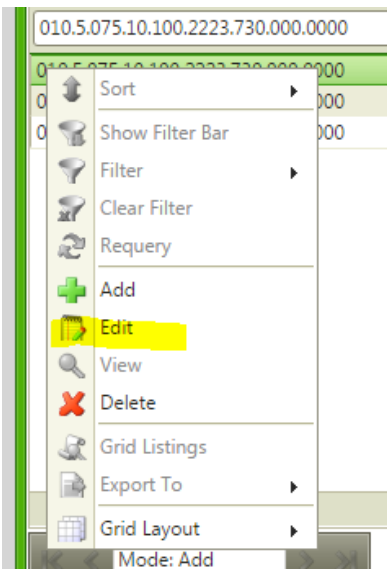
Double clicking any line item shows the current status of that account, not including the transaction being entered.

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.