



**Texas Skyward User Group Conference**

# **New Year Budgeting Overview**

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# Budgeting Overview



*There are several avenues you can take to enter your budget in Skyward. Learn how to develop your budget via the web budget management area so budget figures can be easily viewed and reported.*

- Combining salary and expense budget
  - How Salary Negotiations options affect combining budgets
- Merging budget using multiple budget types – pros & cons
  - Pro: Each group/dept. can have its own budget type
  - Con: Only Expense budgets included; Revenue accounts excluded
- Individual Work Files vs. Mass Change – when to use each
  - Why won't the status change to S if the entries have been submitted
- Creating multiple budget scenarios
  - How to provide a **quick** scenario without going through all the steps
- Reporting multiple budget scenarios

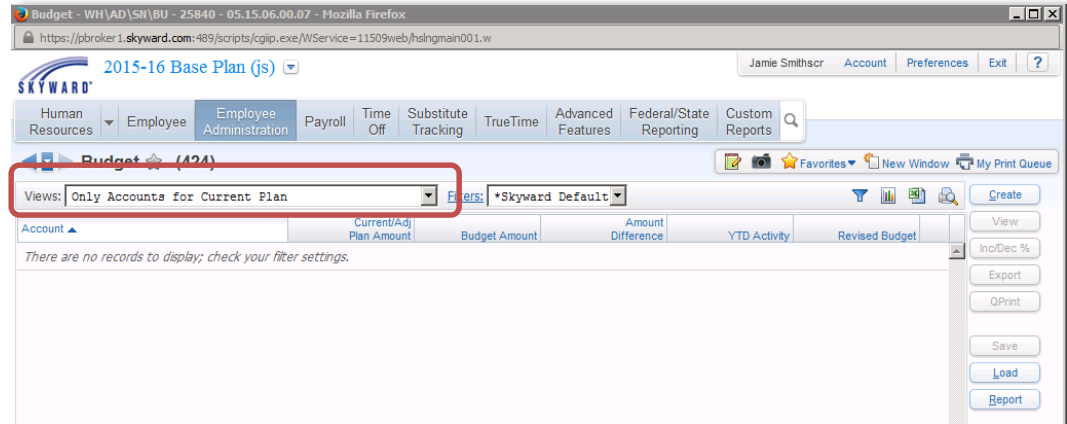
# Salary Negotiations



## Salary Negotiations

When exporting from Salary Negotiations, be  
sure to select all the right options

On main create screen, set the Views to:  
ONLY ACCOUNTS FROM CURRENT PLAN



# Salary Negotiations



## Salary Negotiations

Typically set Budget Amount to REPLACE  
EXISTING AMOUNT.

Round Revised Budget Amounts

Create records for only accounts in current plan

Selection Parameters should be set so that  
Vacant Assignments is used.

All Job Types including Blanks are included.

The screenshot shows a web browser window titled "Budget Compare Setup - WHVAD\SN\BU - 25840 - 05.16.06.00.07 - Mozilla Firefox". The URL is "https://pbroker1:482/scripts/cgiip.exe/WService=11509web/hsIngedit004.w?VWhereFrom=rpmp1n01&isPopup=true". The page title is "Budget Compare Setup (138)".

**Budget Compare Setup**

Compare Budget Year: 2015-2016 September 1, 2015 - August 31, 2016  
New Budget Year: 2016-2017 September 1, 2016 - August 31, 2017  
Budget Amount:  Add to Existing Amount (2016 - 2017)  
 Replace Existing Amount (2016 - 2017)  
 Round Revised Budget Amounts

**Selection Processing**

Use Account Filter (create only records within selected ranges):  
 Create records for only accounts affected by current plan  
 Create records for all accounts within selected ranges  
\* Selection Parameters: All Assignments w/Vacant

**Job Types**

\* Select Job Types:  
ADMINST/PROF - PG 1  
ADMINST/PROF - PG 2  
ADMINST/PROF - PG 3  
ADMINST/PROF - PG 4  
ADMINST/PROF - PG 5  
ADMINST/PROF - PG 6  
ADMINST/PROF - PG 7  
AUX/MANUAL TRADES - PG 1  
AUX/MANUAL TRADES - PG 1FS  
AUX/MANUAL TRADES - PG 2  
AUX/MANUAL TRADES - PG 2FS  
AUX/MANUAL TRADES - PG 3  
AUX/MANUAL TRADES - PG 3FS  
AUX/MANUAL TRADES - PG 4  
AUXILIARY/MANUAL TRADES - PG 2M  
53 of 53 records selected  
 Include Blank Job Types

Buttons: Save, Back

# Salary Negotiations



## Salary Negotiations

Budget Compare Setup - WHVAD\SN\BU - 25840 - 05.16.06.00.07 - Mozilla Firefox  
https://pbroker1.482/scripts/cgiip.exe/WService=11509web/hsIngedit004.w?VWhereFrom=rpmpIn01&isPopup=true

### Budget Compare Setup (138)

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ADMINST/PROF - PG 7  
AUX/MANUAL TRADES - PG 1  
AUX/MANUAL TRADES - PG 1FS  
AUX/MANUAL TRADES - PG 2  
AUX/MANUAL TRADES - PG 2FS  
AUX/MANUAL TRADES - PG 3  
AUX/MANUAL TRADES - PG 3FS  
AUX/MANUAL TRADES - PG 4  
AUXILIARY/MANUAL TRADES - PG 2M

53 of 53 records selected

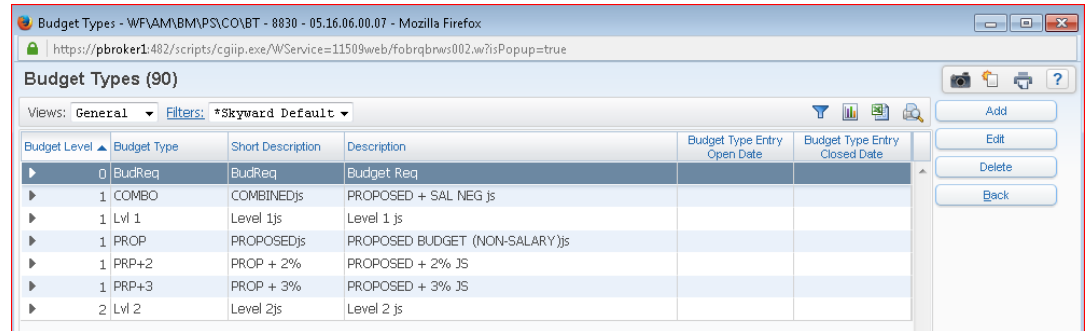
Include Blank Job Types

Save  
Back

# Budget Types

## Budget Types

When to use a budget type with a different level



Budget Types (90)

Views: General Filters: \*Skyward Default

Budget Level	Budget Type	Short Description	Description	Budget Type Entry Open Date	Budget Type Entry Closed Date
0	BudReq	BudReq	Budget Req		
1	COMBO	COMBINEDjs	PROPOSED + SAL NEG js		
1	Lvl 1	Level 1js	Level 1 js		
1	PROP	PROPOSEDjs	PROPOSED BUDGET (NON-SALARY)js		
1	PRP+2	PROP + 2%	PROPOSED + 2% JS		
1	PRP+3	PROP + 3%	PROPOSED + 3% JS		
2	Lvl 2	Level 2js	Level 2 js		

# Budget Types

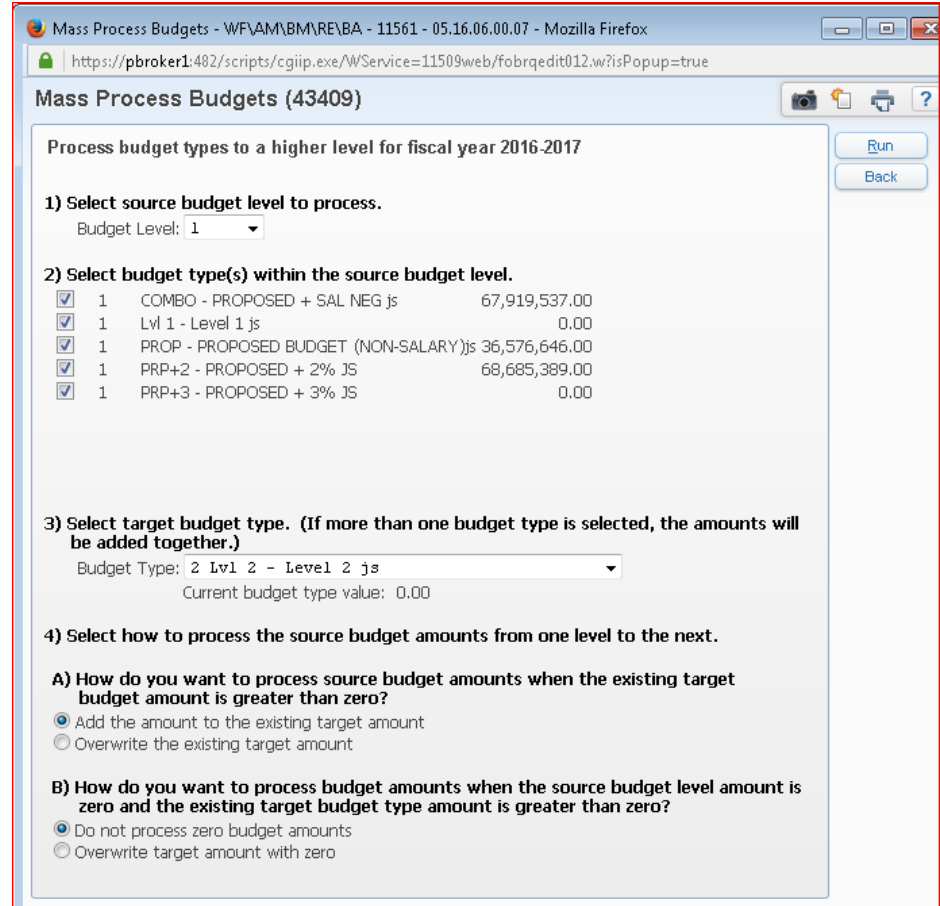
## Budget Types

When to use a budget type with a different level

If using multiple budget types, note that this

Process does not process Revenue accounts,

Only Expense accounts.



Mass Process Budgets - W:\AM\BM\RE\BA - 11561 - 05.16.06.00.07 - Mozilla Firefox  
https://pbroker1:482/scripts/cgiip.exe/WService=11509web/fobrqedit012.w?isPopup=true

**Mass Process Budgets (43409)**

Process budget types to a higher level for fiscal year 2016-2017

**1) Select source budget level to process.**  
Budget Level: 1

**2) Select budget type(s) within the source budget level.**

<input checked="" type="checkbox"/>	1	COMBO - PROPOSED + SAL NEG js	67,919,537.00
<input checked="" type="checkbox"/>	1	Lvl 1 - Level 1 js	0.00
<input checked="" type="checkbox"/>	1	PROP - PROPOSED BUDGET (NON-SALARY)js	36,576,646.00
<input checked="" type="checkbox"/>	1	PRP+2 - PROPOSED + 2% JS	68,685,389.00
<input checked="" type="checkbox"/>	1	PRP+3 - PROPOSED + 3% JS	0.00

**3) Select target budget type. (If more than one budget type is selected, the amounts will be added together.)**  
Budget Type: 2 Lvl 2 - Level 2 js  
Current budget type value: 0.00

**4) Select how to process the source budget amounts from one level to the next.**

**A) How do you want to process source budget amounts when the existing target budget amount is greater than zero?**

- Add the amount to the existing target amount
- Overwrite the existing target amount

**B) How do you want to process budget amounts when the source budget level amount is zero and the existing target budget type amount is greater than zero?**

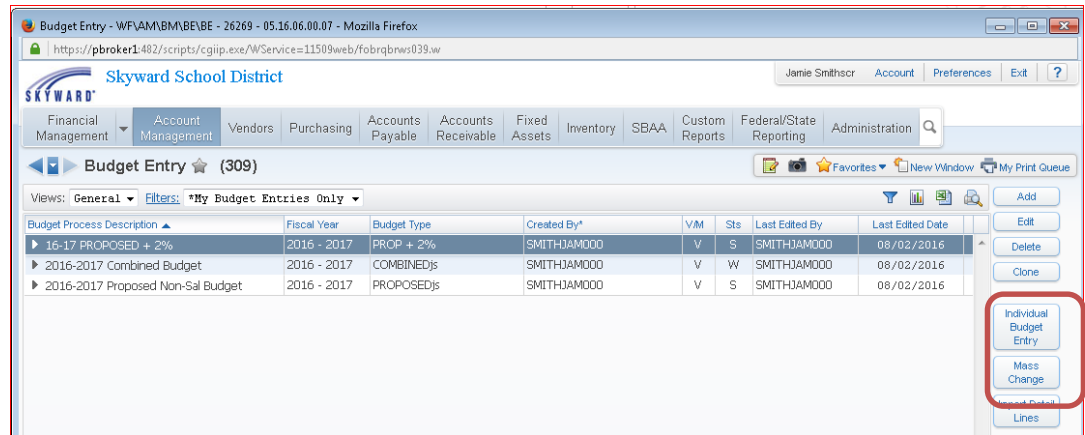
- Do not process zero budget amounts
- Overwrite target amount with zero

Buttons: Run, Back

# Budget Entry

## Individual Work Files vs. Mass Change

Limit Mass Change via Security so that only  
Business office has access to this option.



The screenshot shows the Skyward School District Budget Entry interface. The browser window title is "Budget Entry - WFLAM\BM\BEVE - 26269 - 05.16.06.00.07 - Mozilla Firefox". The URL is "https://pbroker1482/scripts/cgiip.exe/?Service=11509web/fobrqbnws039.w". The user is logged in as "Jamie Smithscr". The interface includes a navigation menu with options like Financial Management, Account Management, Vendors, Purchasing, Accounts Payable, Accounts Receivable, Fixed Assets, Inventory, SBAA, Custom Reports, Federal/State Reporting, and Administration. The main content area is titled "Budget Entry (309)" and shows a table of budget entries. The table has columns for Budget Process Description, Fiscal Year, Budget Type, Created By, V/M, Sts, Last Edited By, and Last Edited Date. The table contains three rows of data. On the right side of the table, there are several action buttons: Add, Edit, Delete, Clone, Individual Budget Entry, Mass Change, and Lines. The "Individual Budget Entry" and "Mass Change" buttons are highlighted with a red box.

Budget Process Description	Fiscal Year	Budget Type	Created By*	V/M	Sts	Last Edited By	Last Edited Date
▶ 16-17 PROPOSED + 2%	2016 - 2017	PROP + 2%	SMITHJAM000	V	S	SMITHJAM000	08/02/2016
▶ 2016-2017 Combined Budget	2016 - 2017	COMBINEDjs	SMITHJAM000	V	W	SMITHJAM000	08/02/2016
▶ 2016-2017 Proposed Non-Sal Budget	2016 - 2017	PROPOSEDjs	SMITHJAM000	V	S	SMITHJAM000	08/02/2016



# Creating Budgeting Scenarios in Salary Negotiations



## Quick scenario building

1. Save the base plan budget as 1<sup>st</sup> scenario
2. Close & re-open Budget and recreate.  
Apply % to new calculated amount & save.
3. Repeat step 2 and apply a different %, and Save.

The screenshot displays the Skyward software interface for budgeting. A dialog box titled "Revise Budget Amounts (63)" is open, showing options to increase or decrease the budget by a percentage. The "Increase" option is selected, and the percentage is set to 2.0000%. A message box explains that increasing a budget amount of 100.00 by 2.0000% results in a new revised budget of \$102.00. The "Round Budget Amount" checkbox is checked. The background shows a table of budget accounts with columns for "Current/Adj", "2015-2016", "Amount", "2015-2016", "2016-2017", and "% Chg".

Account	Current/Adj	2015-2016	Amount	2015-2016	2016-2017	% Chg
199 R 00 5831 00 000 0 00 000						0.000%
199 E 11 6118 00 002 0 11 000						-11.738%
199 E 11 6118 00 041 0 11 000						673.195%
199 E 11 6118 00 043 0 11 000						673.195%
199 E 11 6118 00 104 0 11 000						676.340%
199 E 11 6118 DH 002 0 11 000						-11.738%
199 E 11 6118 DH 041 0 11 000						-19.304%
199 E 11 6118 DH 043 0 11 000						-33.544%
199 E 11 6118 DH 101 0 11 000						676.340%
199 E 11 6118 DH 102 0 11 000						-17.622%
199 E 11 6118 DH 106 0 11 000						-31.043%
199 E 11 6118 DH 107 0 11 000						676.699%
199 E 11 6118 FC 002 0 11 000						675.193%
199 E 11 6118 TM 043 0 11 000						-82.347%
199 E 11 6118 TM 106 0 11 000						-82.347%
199 E 11 6118 TM 107 0 11 000						-82.347%
199 E 11 6118 00 000 0 11 000						695.474%

# Creating Budgeting Scenarios in Salary Negotiations

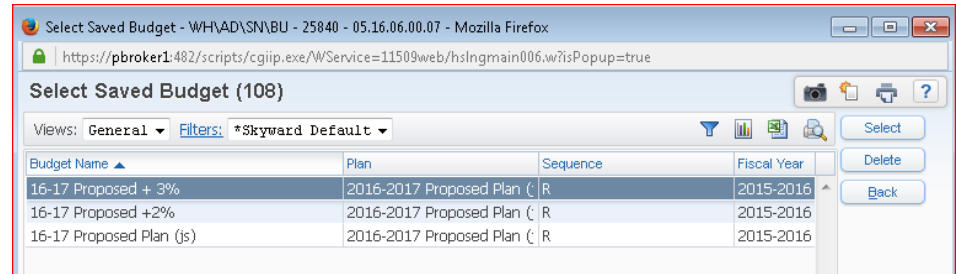


## Quick scenario building

You should end up with 3 saved budget  
Scenarios.

This should only be used to create PRELIMINARY  
Scenarios to assist with determining exact  
Percentage increase to be applied.

This will not replace the normal scenario  
Building because this option overstates  
Benefit amounts so cannot be used for final  
Budget.



# Reporting Budgeting Scenarios



Select Report option

Compare 2 plan – Detail & Summary

Choose the Summary Option...

The screenshot shows a web browser window titled "Budget Comparison Report - WH\AD\SN\BU - 25840 - 05.16.06.00.07 - Mozilla Firefox". The URL is <https://pbroker1.482/scripts/cgiip.exe/WService=11509web/hslngmain007.w?isPopup=true>. The page title is "Budget Comparison Report (99)".

The main content area is titled "Budget Comparison Report" and contains two columns for "Budget 1" and "Budget 2".

Budget 1		Budget 2	
* Select Budget:	16-17 Proposed Plan (js)	* Select Budget:	16-17 Proposed + 3%
Date Created:	08/02/2016 8:59:59 AM	Date Created:	08/02/2016 9:06:40 AM
Fiscal Year:	2015-2016	Fiscal Year:	2015-2016
New Year:	2016-2017	New Year:	2016-2017
Plan Total:	36,471,208.06	Plan Total:	37,565,590.41
Budget Total:	6,948,507.00	Budget Total:	6,948,507.00
Difference:	29,522,701.06	Difference:	30,617,083.41

Below the budget comparison is the "Report Options" section:

Report Type:  Detail Report  Summary Report

\* Sequence: R - REGULAR ACCOUNT SEQUENCE

Breaks: FND T FC OBJ SO ORG F PI LOC

Asterisk (\*) denotes a required field

# Reporting Budgeting Scenarios



## Select Report option

Report will display comparison between 2 plans

Based on breaks selected when report run.

Can only compare 2 scenarios, but the reports

Can be exported to Excel so that all plans

Can be included on an Excel spreadsheet .

Once the expected percentage has been

Decided, then the normal scenario building

Process will need to be run so that the true,

Final budget can be created.

4pmp1n58.r 00-4 05.16.06.00.00		SCRAMBLED DATABASE Budget Comparison Report - Summary					08/02/16	Page:1 10:44 AM
SAVED BUDGET	PLAN	FIS YEAR	NEW YEAR	DATE/TIME CREATED	PLAN TOTAL	BUDGET TOTAL	DIFFERENCE	
16-17 Proposed Plan (je)	2016-2017 Proposed P	2015-2016	2016-2017	08/02/2016 8:59:59 AM	36,471,208.06	6,948,507.00	29,522,701.06	
16-17 Proposed + 3%	2016-2017 Proposed P	2015-2016	2016-2017	08/02/2016 9:06:40 AM	37,565,590.41	6,948,507.00	30,617,083.41	
ACCOUNT NUMBER		CUR PLAN AMT	BUDGET AMT	DIFFERENCE	YTD ACTIVITY	REVISED BDGT	PERCENT CHANGE	
199 R 00 58--								
16-17 Proposed Plan (je)		1,819,960.68	0.00	1,819,960.68	0.00	1,819,951.00	0.0000%	
16-17 Proposed + 3%		1,874,549.53	0.00	1,874,549.53	0.00	1,874,550.00	0.0000%	
199 R 00								
16-17 Proposed Plan (je)		1,819,960.68	0.00	1,819,960.68	0.00	1,819,951.00	0.0000%	
16-17 Proposed + 3%		1,874,549.53	0.00	1,874,549.53	0.00	1,874,550.00	0.0000%	
199 E 11 61--								
16-17 Proposed Plan (je)		23,308,105.38	5,392,834.00	17,915,271.38	1,786,388.76	23,308,256.00	332.2051%	
16-17 Proposed + 3%		24,007,503.68	5,392,834.00	18,614,669.68	1,786,388.76	24,007,507.00	345.1742%	
199 E 11								
16-17 Proposed Plan (je)		23,308,105.38	5,392,834.00	17,915,271.38	1,786,388.76	23,308,256.00	332.2051%	
16-17 Proposed + 3%		24,007,503.68	5,392,834.00	18,614,669.68	1,786,388.76	24,007,507.00	345.1742%	
199 E 12 61--								
16-17 Proposed Plan (je)		499,714.64	58,582.00	441,132.64	37,917.32	499,710.00	753.0174%	
16-17 Proposed + 3%		514,701.30	58,582.00	456,119.30	37,917.32	514,704.00	778.5997%	





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**THANK YOU FOR ATTENDING!**

