



Texas Skyward User Group Conference

TX – 09L – New Year Budgeting at a Glance

Kim Robinson



New Year Budgeting at a Glance



This session demonstrates how to develop your budget via the web budget management area so budget figures can be easily viewed and reported.

- Creating the Budget Entry Template
 - Original vs. Budget Types
 - Options for creating the initial budget
 - Budget Entry Status
- Budgeting for Salary and Benefits
- Reporting Budget Amounts
- Combining Budget Amounts
- Updating to the Original Budget
- Adopting the Budget

We typically recommend utilizing budget types when creating the new year budget.

Budget Types - WFAM\BM\PS\CO\BT - 8830 - 05.17.06.00.06 - Google Chrome

▲ Not secure | https://pbroker1:489/scripts/cgiip.exe/WService=11509web/fabrqrws002.w?isPopup=true

Budget Types

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	COMB	COMBINE KR	COMBINED KR		
▶ 1	COMBO	COMBINEDjs	PROPOSED + SAL NEG js	09/08/2016	
▶ 1	IMPKR	IMPORT KR	IMPORT KIR		
▶ 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		
▶ 1	SALKR	SALARY KR	SALARY KR		
▶ 1	WORK	WORKING KR	WORKING KR		
▶ 2	Lvl 2	Level 2js	Level 2 js		

20 11 records displayed Budget Level:

We will look at options for creating the budget template(s). This section includes a discussion on the benefits of using multiple budget types and budgeting by department.

Lyle Alveyor Account Preferences Exit ?

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Budget Entry

Views: General Budget Templates - Current Year 2017

Budget Process Description	Fiscal Year*	Budget Type	Created By	VM	Users	Sts	Last Edited By	Last Edited Date	Last Edited Time	Minimum Budget Amount	Process ID
▶ 2017-2018 BUDGET IMPORT IR	2017 - 2018	IMPORT IR	AWEYSL0001			W	AWEYSL0001	07/27/2017	1:21 PM	0.00	20
▶ 2017-2018 Non-Salary Budget IR	2017 - 2018	WORKING IR	AWEYSL0001						12:00 AM	0.00	19
▶ FINAL BUDGET 17-18 (so)	2017 - 2018	Original	AMROCH001	V		S	AMROCH001	07/17/2017	11:56 AM	999,999,999.00	18

Add Edit Delete Clone Individual Budget Entry Mass Change Import Detail Lines Delete Workflow Update Attach

The budgeted amount for salaries and benefits is typically exported from Salary Negotiations.

2017-2018 Working Plan KR

Home Employee Administration Payroll Time Off Substitute Tracking TrueTime Advanced Features Federal/State Reporting Custom Reports

2017-2018 Working Plan KR

Home Favorites New Window My Print Queue

Budget

Views: All Accounts Created Filters: Skyward Default

Account	Current Yr Plan Amount	2016-2017 Budget Amount	Amount Difference	2016-2017 YTD Activity	2017-2018 Revised Budget	% Change
199 R 00 5931 00 000 0 10 000	865,016.04	0.00	865,016.04	0.00	865,016.00	0.0000%
199 R -----	865,016.04	0.00	865,016.04	0.00	865,016.00	0.0000%
199 E 11 6118 00 002 0 11 000	4,000.00	494.00	3,516.00	1,500.04	4,000.00	726.4463%
199 E 11 6118 00 104 0 11 000	8,400.00	99,994.00	-90,594.00	7,000.00	8,400.00	-91.5138%
199 E 11 6118 04 002 0 11 000	22,000.00	894,994.00	-872,994.00	17,112.88	22,000.00	-97.5419%
199 E 11 6118 04 102 0 11 000	8,400.00	0.00	8,400.00	7,000.00	8,400.00	0.0000%
199 E 11 6118 FC 002 0 11 000	1,000.00	0.00	1,000.00	833.40	1,000.00	0.0000%
199 E 11 6119 00 002 0 11 000	3,494,206.71	0.00	3,494,206.71	2,936,534.38	3,494,209.00	0.0000%
199 E 11 6119 00 002 0 21 000	370,647.99	0.00	370,647.99	309,934.33	370,650.00	0.0000%
199 E 11 6119 00 002 0 22 000	887,677.92	0.00	887,677.92	755,725.38	887,680.00	0.0000%
199 E 11 6119 00 002 0 23 000	428,169.10	0.00	428,169.10	354,578.80	428,169.00	0.0000%
199 E 11 6119 00 002 0 24 000	183,110.59	0.00	183,110.59	151,942.00	183,111.00	0.0000%
199 E 11 6119 00 002 0 25 000	62,733.35	0.00	62,733.35	51,724.18	62,734.00	0.0000%
199 E 11 6119 00 002 0 28 000	21,671.00	0.00	21,671.00	18,059.20	21,671.00	0.0000%
199 E 11 6119 00 041 0 11 000	25,115.25	0.00	25,115.25	20,939.49	25,115.00	0.0000%
199 E 11 6119 00 041 0 21 000	125.00	0.00	125.00	54,270.90	125.00	0.0000%
199 E 11 6119 00 041 0 23 000	1,000.00	0.00	1,000.00	833.40	1,000.00	0.0000%
199 E 11 6119 00 041 0 28 000	21,664.50	0.00	21,664.50	18,063.80	21,665.00	0.0000%
199 E 11 6119 00 043 0 11 000	25,115.26	0.00	25,115.26	20,939.42	25,115.00	0.0000%
199 E 11 6119 00 043 0 21 000	125.00	0.00	125.00	104.00	125.00	0.0000%

Reports may be created to display the new year budget amounts by budget types.

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Budgetary Data Mining

Report Information Parameters Breaks Account Ranges Field Selection

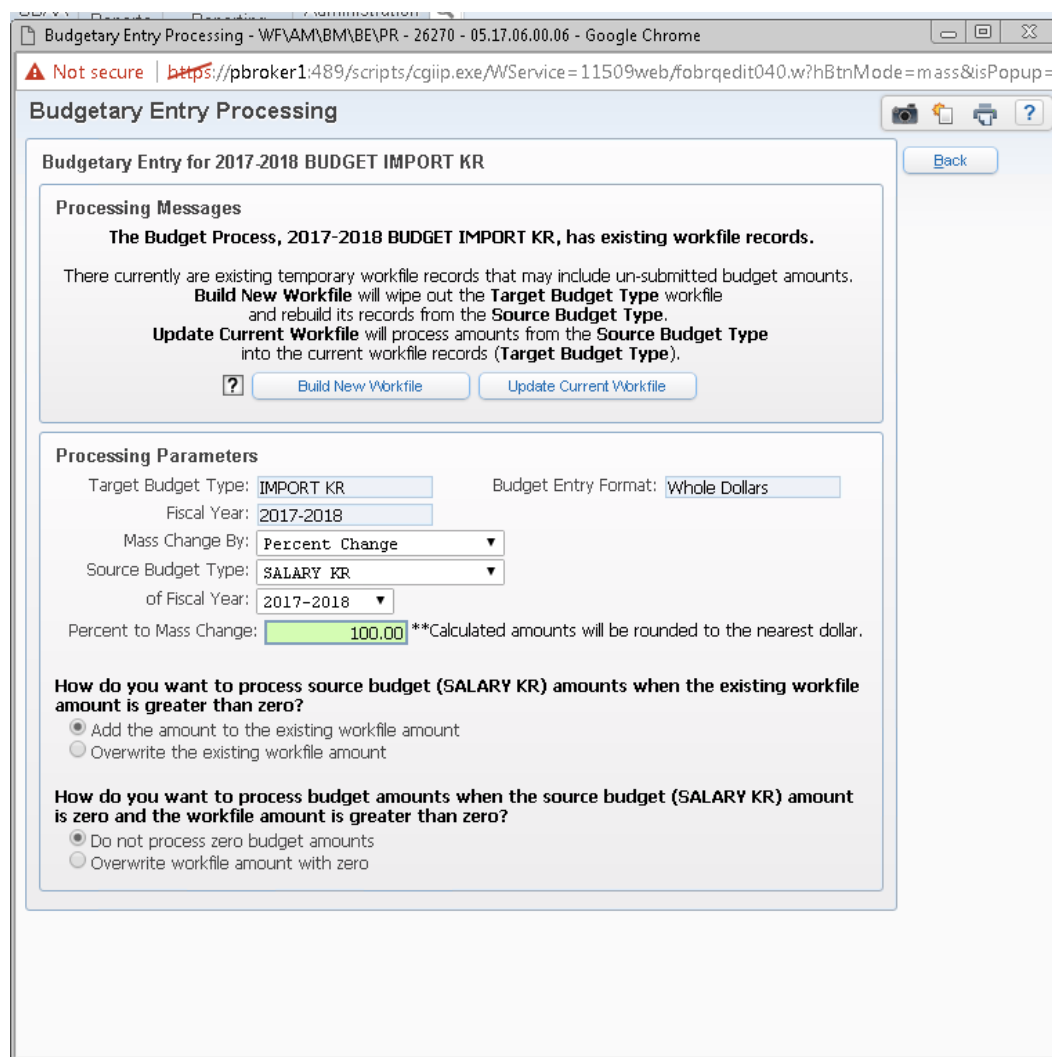
Report Name: Budget Type Reporting KR
 Report Title: Budget Type Reporting KR
 Report Type: Revenue/Expense Summary

Field Selection

Views: All Field Selections Filters: *Skyward Default

#	Field	Heading 1	Heading 2	Type	Combo field	Calculation
1	Account Number		FND T FC OBJ SO ORG F PI			
2	Original Budget	<Y>	Original Budget	Single		
3	Revised Budget	<Y>	Revised Budget	Single		
4	Fiscal Year Activity	<Y>	FY Activity	Single		
5	WORKING KR (Budget Type)	<Y>	WORKING KR	Single		
6	SALARY KR (Budget Type)	<Y>	SALARY KR	Single		

There are specific steps necessary to combine multiple budget types into a single template.



Budgetary Entry Processing - WFV\AM\BM\BE\PR - 26270 - 05.17.06.00.06 - Google Chrome
Not secure | https://pbroker1:489/scripits/cgiip.exe/WSservice=11509web/fobrqredit040.w?hBtnMode=mass&isPopup=

Budgetary Entry Processing

Budgetary Entry for 2017-2018 BUDGET IMPORT KR [Back](#)

Processing Messages
The Budget Process, 2017-2018 BUDGET IMPORT KR, has existing workfile records.

There currently are existing temporary workfile records that may include un-submitted budget amounts.
Build New Workfile will wipe out the **Target Budget Type** workfile and rebuild its records from the **Source Budget Type**.
Update Current Workfile will process amounts from the **Source Budget Type** into the current workfile records (**Target Budget Type**).

[?](#) [Build New Workfile](#) [Update Current Workfile](#)

Processing Parameters

Target Budget Type: Budget Entry Format:
Fiscal Year:
Mass Change By: ▾
Source Budget Type: ▾
of Fiscal Year: ▾
Percent to Mass Change: **Calculated amounts will be rounded to the nearest dollar.

How do you want to process source budget (SALARY KR) amounts when the existing workfile amount is greater than zero?

Add the amount to the existing workfile amount
 Overwrite the existing workfile amount

How do you want to process budget amounts when the source budget (SALARY KR) amount is zero and the workfile amount is greater than zero?

Do not process zero budget amounts
 Overwrite workfile amount with zero



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THANK YOU FOR ATTENDING!

