

New Year Budgeting at a Glance

What will be covered:

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

Links to additional resources:

[Budget Type Codes](#)

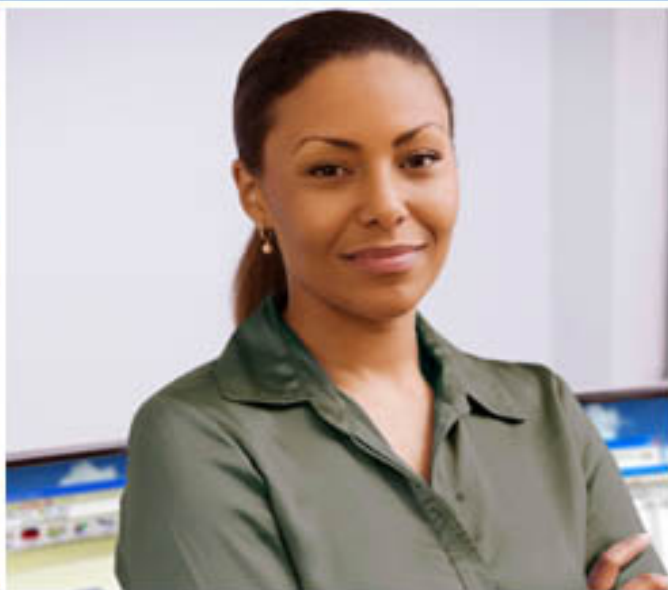
[Budget Process Entry](#)

[Individual Budget Entry](#)

[Budget Import](#)

[Budgetary Data Mining: Revenue and Expense Summary](#)

Link to pdf of PowerPoint if applicable



Texas Skyward User Group Conference

New Year Budgeting at a Glance

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Original Budget and Budget Types

Budget Types (107)

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		
▶ 1	WRK	Work LK	Working LK		
▶ 2	Lvl 2	Level 2js	Level 2 js		

Buttons: Add, Edit, Delete, Back

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Create budget entry templates to manage and update your various budget figures

When ready, submit the figures to confirm that particular budget

Budget Entry ☆ (272)

Views: General Filters: *Budgets I Have Access To

Budget Process Description	Fiscal Year	Budget Type	Created By	V/M	Users	Sts	Last Edited
▶ 16-17 Combined Budget - JK	2016 - 2017	COMBINEDjs	KAYSCJAN000	M			
▶ 16-17 PROPOSED + 2%-JK	2016 - 2017	PROP + 2%	KAYSCJAN000	M			
▶ 16-17 Proposed Non-Sal Budget - JK	2016 - 2017	PROPOSEDjs	KAYSCJAN000	M			
▶ 2016-2017 Combined Budget	2016 - 2017	COMBINEDjs	SMITHJAM000	M		W	SMITHJAM
▶ 2016-2017 PROPOSED + 2%	2016 - 2017	PROP + 2%	SMITHJAM000	M		S	SMITHJAM
▶ 2016-2017 Proposed Non-Sal Budget	2016 - 2017	PROPOSEDjs	SMITHJAM000	M		S	SMITHJAM
▶ 2018-2019 Import Budget	2018 - 2019	PROPOSEDjs	AKEYSLOL001	V		W	AKEYSLOL
▶ 2018-2019 Non Salary Budget	2018 - 2019	WORKING KR	AKEYSLOL001	M		W	AKEYSLOL
▶ FINAL BUDGET 17-18 (so)	2017 - 2018	Original	AMBROCHR001	V		S	AMBROCH

Buttons: Add, Edit, Delete, Clone, Individual Budget Entry, Mass Change, Import Detail Lines, Delete Workfile, Notes, Attach

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You have the option to Import budgets in the Budget Entry area

Need to setup Budget Details import and allow users to import detail lines

Import File Builder (119)

Views: General | Filters: *Skyward Default

Interface	Description	System	Product Type	Allow Others	Automated	Created By
BE Details	Budget Entry Details	Finance	Account Managemt			AARONS, DUKE

Expand All Collapse All View Printable Details

Import File(s) Add Import File

Budget Entry Details Edit File Delete File

File Details

Data Type: Budget Entry Details File to Import: None Used for imports outside Skybuild: Yes
 Short Description: BE Details File Type: Comma Delimited Contains Header Line: No
 Long Description: Budget Entry Details Text Qualifier: None Print Details of Imported Records: No

Import Fields Edit Selected Fields View Complete File Layout

Column	Field	Area	Length	Format	Specified Value	Overwrite Existing	Data Cross-Reference	Data
Edit Delete +	01 Account	Bud Mgmt	50	X(50)		<input type="checkbox"/>		Any
Edit Delete +	02 Amount	Bud Mgmt	15	->>>.>>>.>>9.99		<input type="checkbox"/>		Any

BE Details Budget Entry Details Finance Account Managemt Akeysr, Lola G

Budget Entry Setup (80)

Budget Entry Setup

Allow users to import detail line items for Budget Entry

Budgetary Entry Processing (111)

Budgetary Entry for UG Budget

Import Options

* Format: BE Details - BE Details - Budget Entry Details

Only Formats flagged as "Used for imports outside Skybuild" are able to be selected.

* File Location: Choose File No file chosen

Processing Messages

There currently are no existing temporary workfile records for this Budget Process record. Running the process will create them. After creating the temporary workfile records you will be able to review, update and, if you choose, submit the new budgetary values.

[Build New Workfile](#)

Processing Parameters

Target Budget Type: Original

Budget Entry Format: Whole Dollars

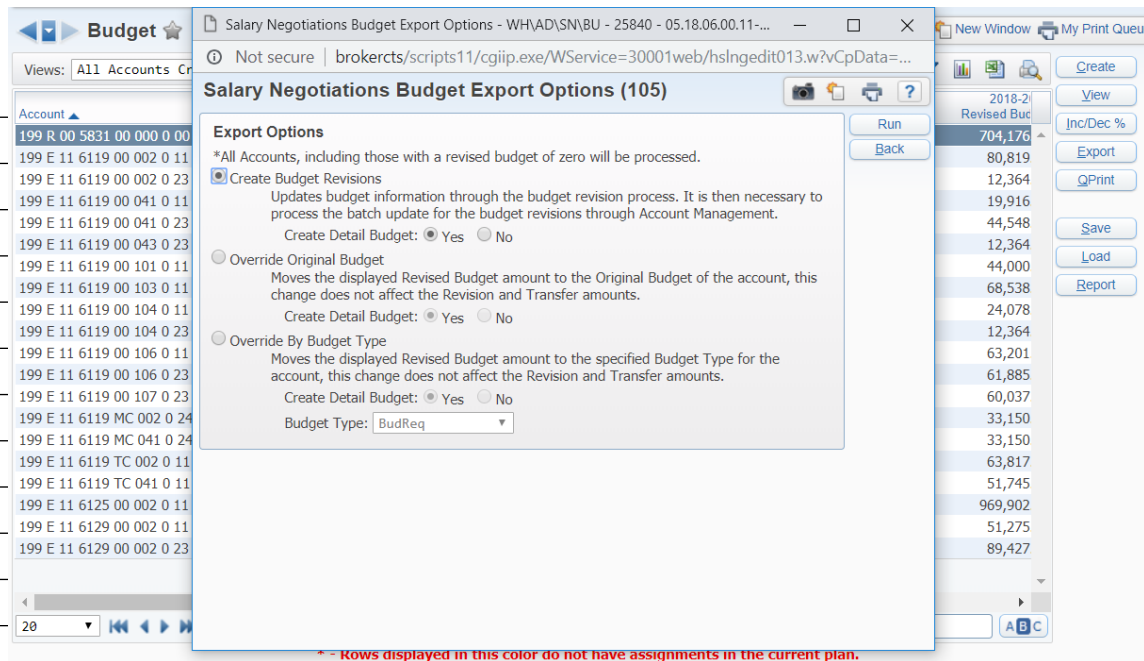
Fiscal Year: 2018-2019

Automatically Add New Accounts

Build New Workfile will wipe out the **Target Budget Type** workfile and rebuild its records from the **Source Budget Type**.

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If you use Salary Negotiations you can bring in the Salary budgets from there into the Budgeting process



The screenshot displays a budgeting application interface. On the left, a list of accounts is shown with columns for account number and balance. A dialog box titled "Salary Negotiations Budget Export Options (105)" is open in the center, providing configuration options for exporting budget data. On the right, a summary table shows the 2018-21 Revised Budget total and a list of account balances.

Account	Balance
199 R 00 5831 00 000 0 00	
199 E 11 6119 00 002 0 11	
199 E 11 6119 00 002 0 23	
199 E 11 6119 00 041 0 11	
199 E 11 6119 00 041 0 23	
199 E 11 6119 00 043 0 23	
199 E 11 6119 00 101 0 11	
199 E 11 6119 00 103 0 11	
199 E 11 6119 00 104 0 11	
199 E 11 6119 00 104 0 23	
199 E 11 6119 00 106 0 11	
199 E 11 6119 00 106 0 23	
199 E 11 6119 00 107 0 23	
199 E 11 6119 MC 002 0 24	
199 E 11 6119 MC 041 0 24	
199 E 11 6119 TC 002 0 11	
199 E 11 6119 TC 041 0 11	
199 E 11 6125 00 002 0 11	
199 E 11 6129 00 002 0 11	
199 E 11 6129 00 002 0 23	

Salary Negotiations Budget Export Options (105)

Export Options

*All Accounts, including those with a revised budget of zero will be processed.

- Create Budget Revisions
Updates budget information through the budget revision process. It is then necessary to process the batch update for the budget revisions through Account Management.
Create Detail Budget: Yes No
- Override Original Budget
Moves the displayed Revised Budget amount to the Original Budget of the account, this change does not affect the Revision and Transfer amounts.
Create Detail Budget: Yes No
- Override By Budget Type
Moves the displayed Revised Budget amount to the specified Budget Type for the account, this change does not affect the Revision and Transfer amounts.
Create Detail Budget: Yes No
Budget Type: BudReq

Buttons: Run, Back

2018-21 Revised Budget
704,176
80,819
12,364
19,916
44,548
12,364
44,000
68,538
24,078
12,364
63,201
61,885
60,037
33,150
33,150
63,817
51,745
969,902
51,275
89,427

* - Rows displayed in this color do not have assignments in the current plan.

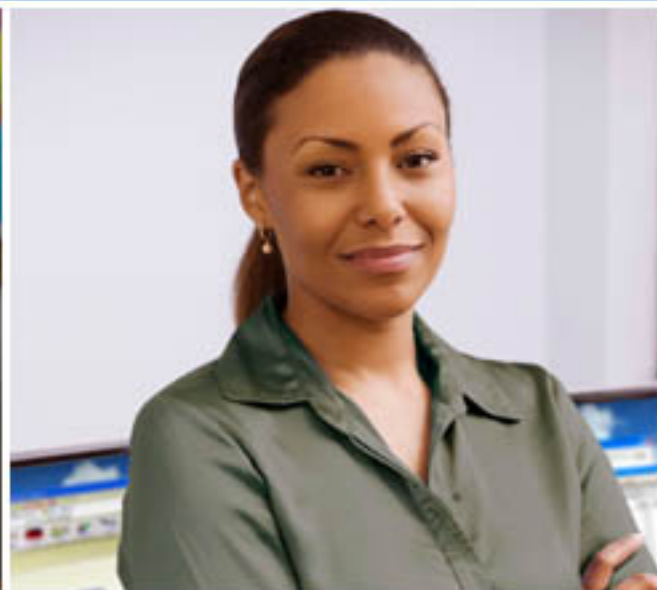
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Use Budgetary Data Mining to review and compare budgets

The screenshot shows the Skyward School District web application interface. The top navigation bar includes links for Home, 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 "Budgetary Data Mining" and features a sidebar with options: Report Information, Parameters, Breaks, Account Ranges, and Field Selection. The "Field Selection" section is active, displaying a table of selected fields for a report named "Budget Type Reporting KR".

#	Field	Heading 1	Heading 2	Type	Combo field	Calculation
1	Account Number		RND T AC OBJ SO DRG 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		



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THANK YOU FOR ATTENDING!

