New Year Budgeting at a Glance

What will be covered:

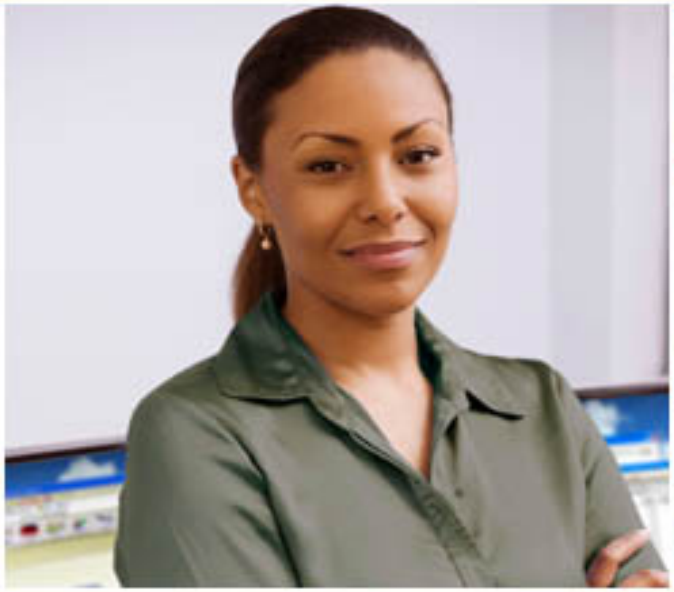
This session demonstrates how to develop your budget via the web budget management area so budget figures can be easily viewed and reported.

- 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

Connor Falk

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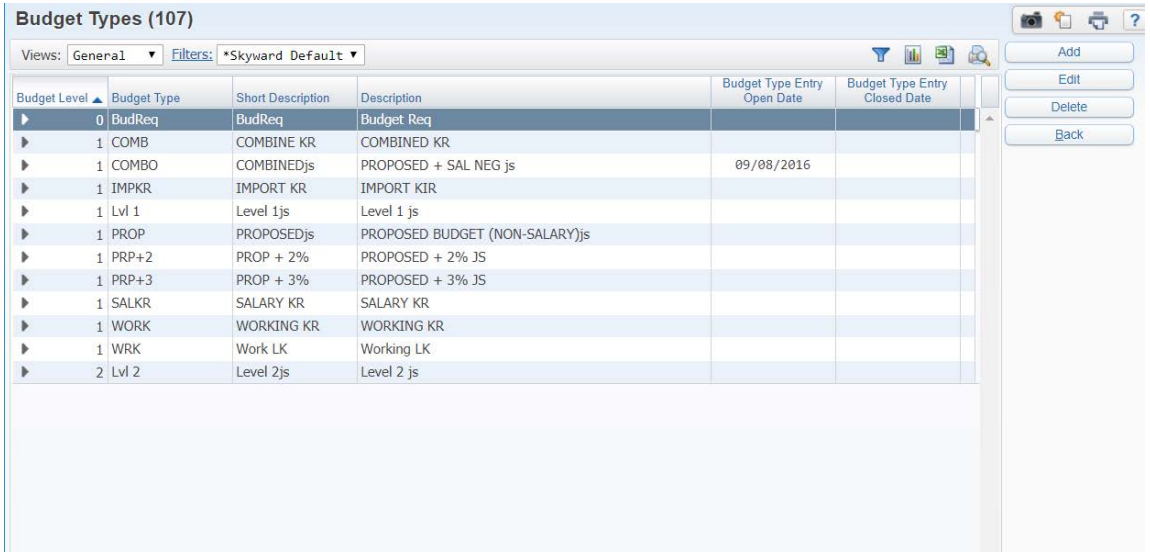
Original Budget and Budget Types



Budget Types (107)

Views: General | Filters: *Skyward Default

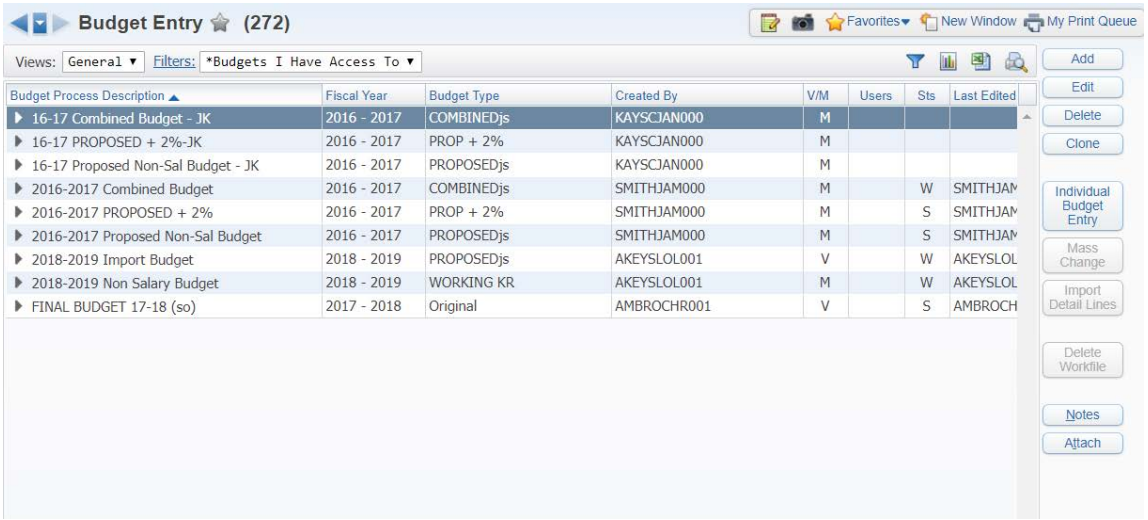
Add | Edit | Delete | Back

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		

New Year Budgeting at a Glance

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

When ready, submit the figures to confirm that particular budget



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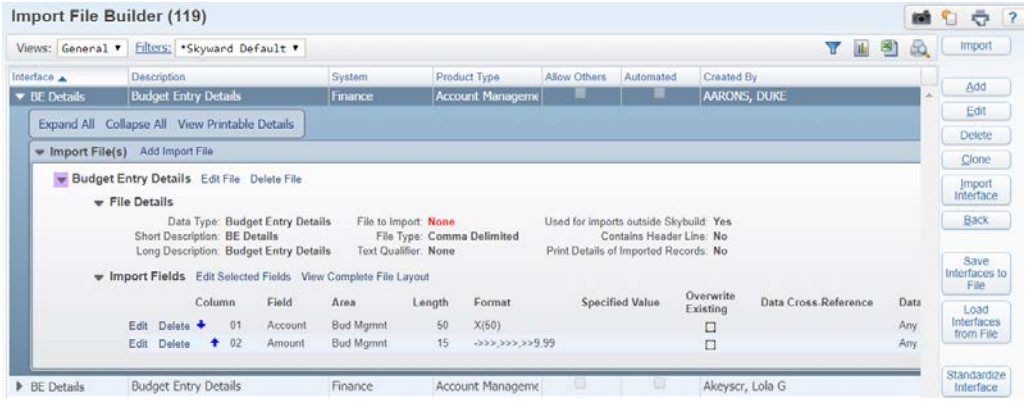
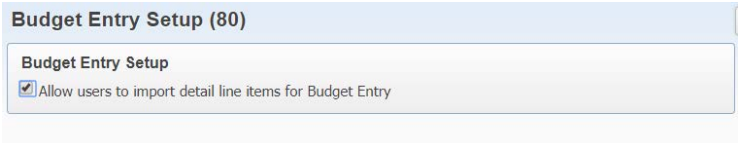
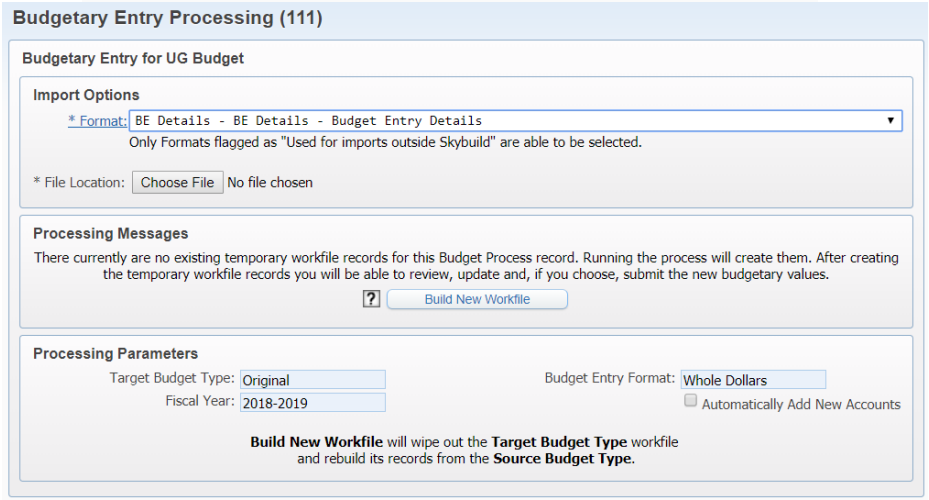
You have the option to Import budgets in the Budget Entry area

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







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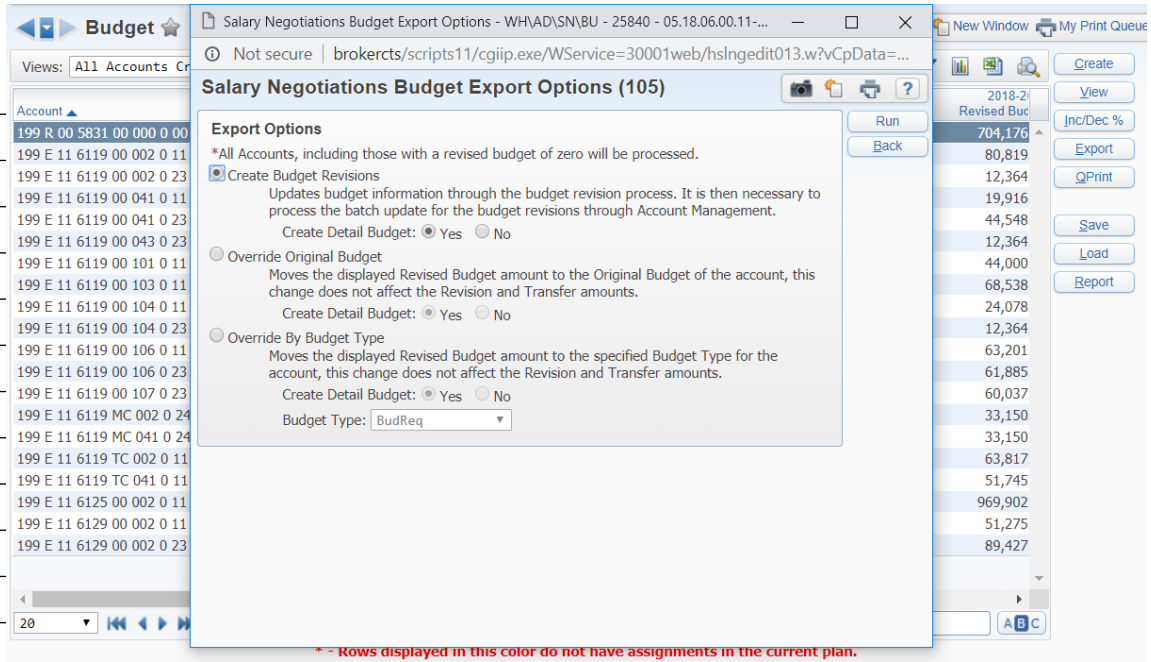
If you use Salary Negotiations you can bring in the Salary budgets from there into the Budgeting process



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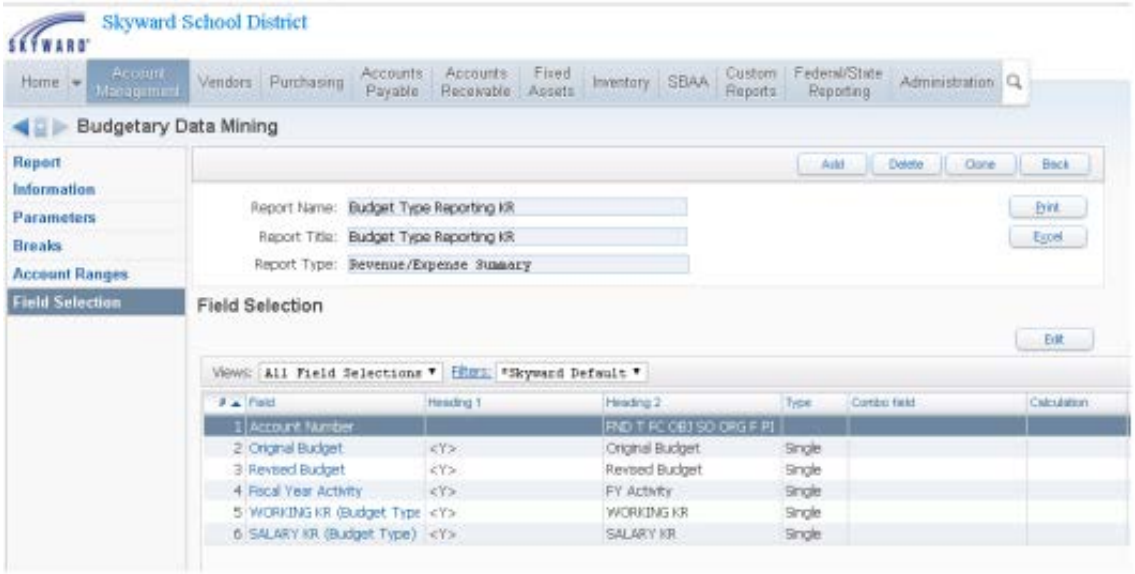
Use Budgetary Data Mining to review and compare budgets



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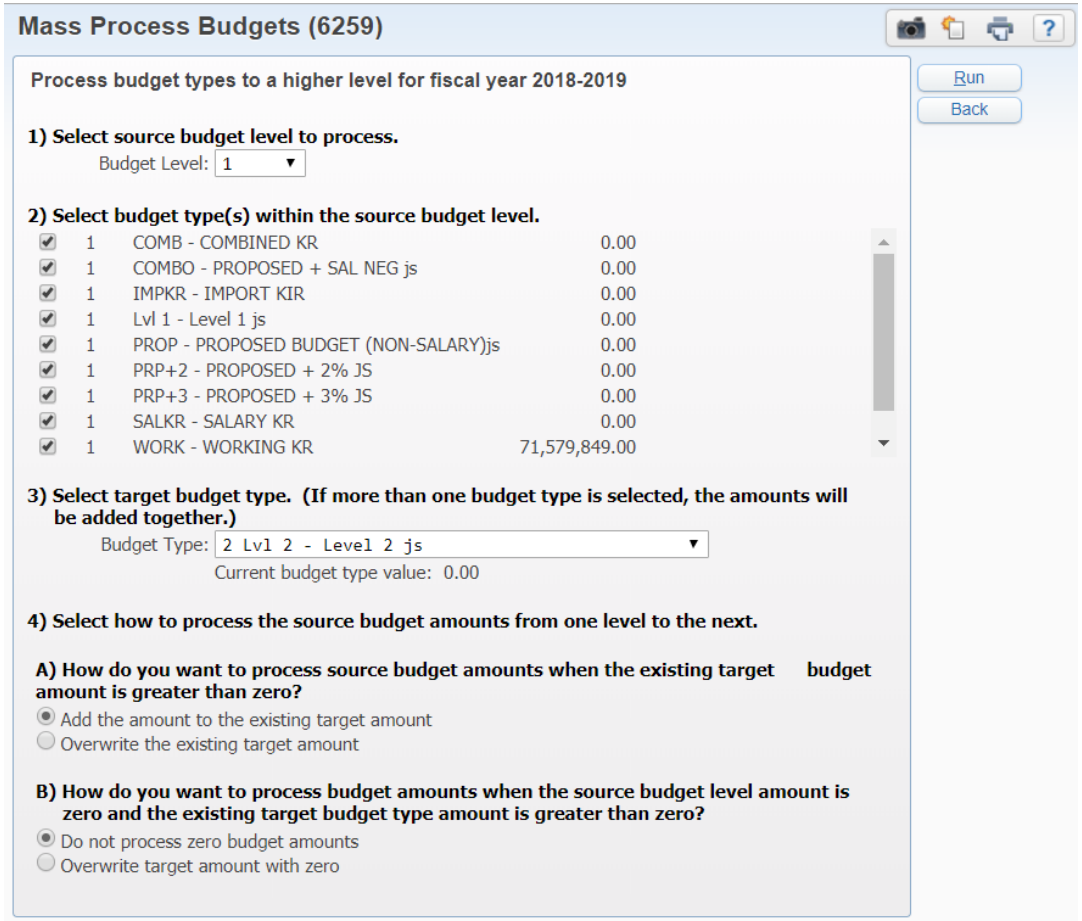
Roll your budgets together to create the Final Budget



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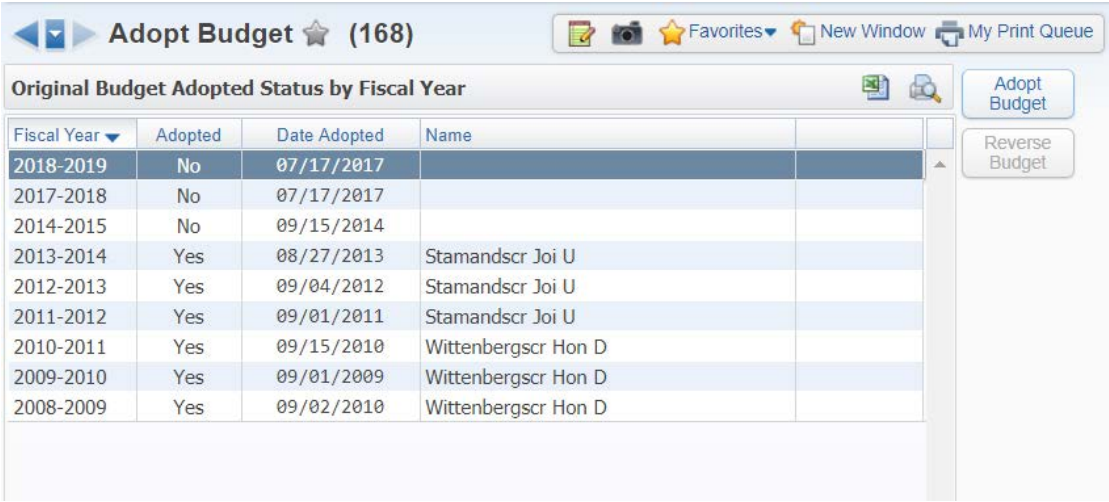
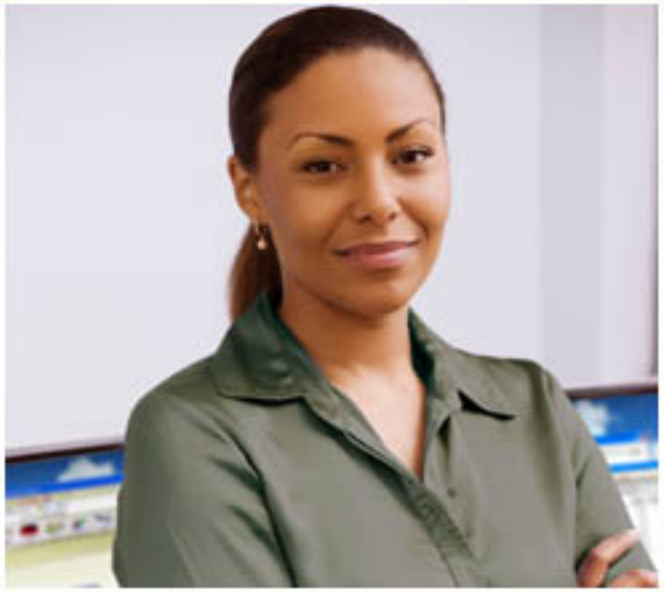
Adopt your budget to lock down the Original Budget figures

Use budget revisions and transfers from then on



End of presentation –

Extra space for other notes



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THANK YOU FOR ATTENDING!

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