

Groups and Categories

15 October 2019 / 10:10 PM / ROOM

ATTENDEES

Skyward Finance Users

AGENDA

Introduction

1. Groups allow management and reporting of budget funds across code structure that may be difficult to accomplish in another way.
2. Categories allow reporting.

Key Points

- Some times the need to create a report across functions and dissimilar object codes can reduce the number of reports needed.
- The use of group coding can reduce if not eliminate the need for regular budget transfers.
- Grouping can be an independent account structure designed for the special needs of an individual district.
- This presentation is how Rains ISD uses these features to benefit the district operations.

NOTES

- **Setup:** WF\AM\CA\PS\C0\CC Path for Group and Category setup.
- Setup: WF\AM\CA\TB\AC\SE Path for assigning Group and Categories to accounts.
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How we use Grouping:

1. Does the campus or department have funds available?
2. Monitoring available funds across multiple functions and objects.
3. Athletics advancement.
4. Tech budget across all functions and PICs.
5. Band budget across ORG and Function codes.

Rains ISD philosophy is to allow Principals and Directors to direct funds where student needs exist regardless of the original budget plan. The direction of funds must fall within the parameters of the campus and district improvement. State dedicated funds must be considered in the design of the system. The setup should consider the skills of the budget manager. Skyward grouping tool was determined to be a simplified solution.

How we use Categories:

1. Budget development.
2. Contracted Services.
3. Utilities.
4. Superintendent budget includes instruction codes.
5. Maintenance for various departments.
6. Campus classification accross all departments.
7. To prevent new accounts from showing up on old reports.