Budget Development Guide

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Budget Development
Where to Start

• Path to start is
  – Financial Management
  – Annual Budget Processing
  – Budget Processing
  – Budget Maintenance
You should see only the specific departments you need for budget entry.

Click on the department you want to work with.
You can configure the screen with what you want to see.

Click icon to add columns you want to see such as current budget or last year’s actual.
Enter your budget requests

Enter budget requests in the white fields. Gray fields are not available for data entry.

Once you highlight a row, the inquiry option will take you into the regular account inquiry screen. The Five year trend button will show a 5 year graph with adopted, amended and actual budget and expenses.
Moving through the budget screen and Saving your entries

You can “tab” or “enter” through the budget entry fields. Just be sure to hit save before you go to a new screen.
With a row highlighted, you may select “Transactions”. This provides a screen where you can add multiple detailed items.
Once you click on “new” you will be able to add individual items on this transaction list and update your budget total on the previous budget screen.

Selecting this button will REPLACE the total on the previous budget screen. You can also OVERRIDE the number on the budget screen manually. These totals may not equal unless you make them equal.
Here is the result from adding transactions.

Even though you can “over-write” the request column, we would suggest that if you are using transactions you add a transaction to bring the total to your full request. (see previous screen)
Viewing Transaction Entered in Previous Budget Development Cycles

You can review what transactions you entered or modifications made at any level by navigating to GL Account Inquiry, choosing a specific account and then selecting the Budget History tab. Finally, in the dropdown “History Type” select Transactions by Budget Level. If you didn’t add transactions in budget development for a particular account, this screen will be blank.
Position information

• The budget for positions and fringe benefits comes from the position budgeting module.
  – This is a separate module from the budget development module.

• You can’t make changes to these “grayed-out” fields but you do have a limited view the “transactions” that make up the dollar figures.
  – Highlight the line item and click “transactions” at the bottom of the screen.
Position requests or deletions

• If you want to request a new position or a change in one of the salary or fringe benefit lines, click on the middle or right icon in the “Attachments” column.
  – This will allow you to attach a note or a document where you can outline your requested change.
Budget Report or Excel Worksheet

F.M. ➔ Reports ➔ Annual Budget ➔ Budget Worksheet

Checking the Excel file box will provide a spreadsheet versus just a report. Once you hit print, go to my reports to open the excel sheet or review the report.
Current Year Budget Amendments
F.M. → Journals → Journals
Select “new” from bottom left

1 - required
2 - Save
### Budget amendment (cont.)

1. Choose your accounts

2. Tab through each field. - (minus sign) for decrease and + for increase. Totals must equal.

3. Be sure to hit save!
Delete Purchase Orders.
(to close them and free up dollars)
F.M. → Procurement → Purchasing → Change Purchase Orders

To find a P.O. Uncheck the box and type search criteria.

Highlight the P.O. to delete and hit complete. Then – validate and approve.