

Next Year Budget Reports (BD-1)

Office of Education Technology: Division of School Technology Services
Questions: Munis@education.ky.gov

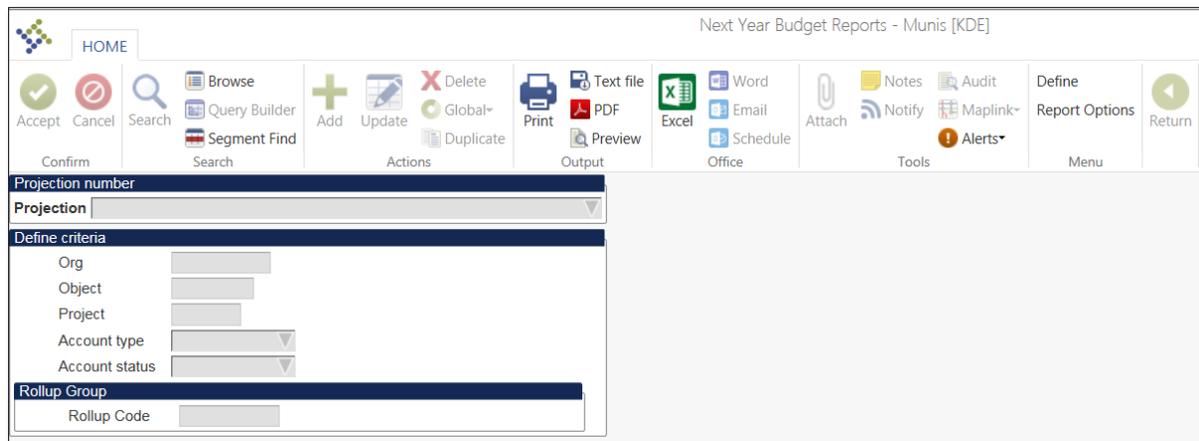
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OVERVIEW

The Next Year Budget Report includes several reporting options that provide budget information for a specified Budget Projection or accounts within a budget projection. If the projection does not include all accounts within a fund, certain columns on the report may not balance.

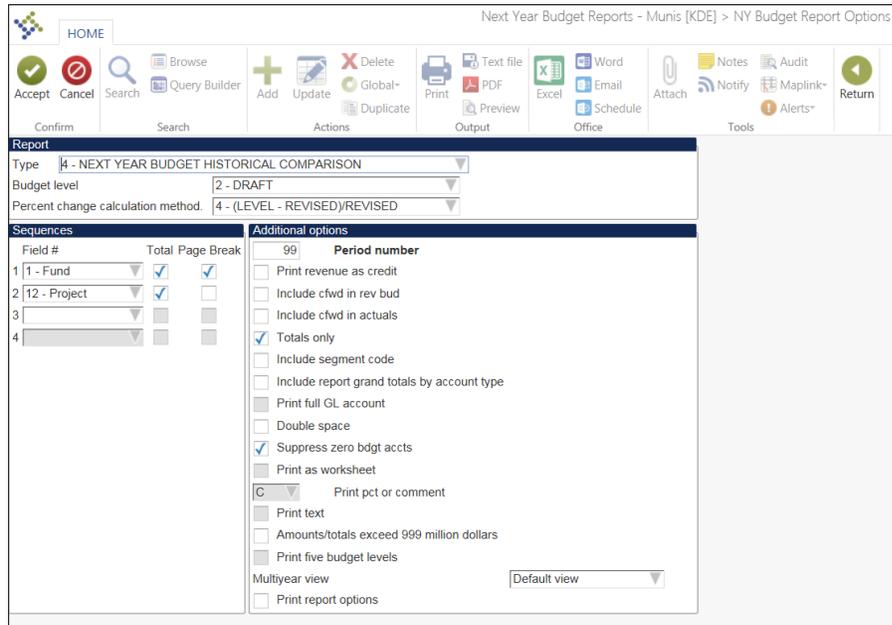
Select: *Financials > Budget Processing > Next Year Budget Reports*

The following screen will appear:



The screenshot displays the 'Next Year Budget Reports - Munis [KDE]' interface. At the top, there is a 'HOME' tab and a toolbar with various icons for actions like 'Accept', 'Cancel', 'Search', 'Query Builder', 'Segment Find', 'Add', 'Update', 'Global-Duplicate', 'Print', 'PDF', 'Preview', 'Text file', 'Excel', 'Word', 'Email', 'Schedule', 'Office', 'Attach', 'Notify', 'Maplink', 'Alerts', 'Define Report Options', and 'Return'. Below the toolbar, there are several input fields and dropdown menus. The 'Projection number' field is a dropdown menu. The 'Define criteria' section includes fields for 'Org', 'Object', 'Project', 'Account type', and 'Account status'. The 'Rollup Group' section includes a 'Rollup Code' field.

1. Select the **Define** button and select a projection for reporting and click **Accept**.
2. Optionally enter account selection criteria and click **Accept**.
3. Select the **Segment Find** button to optionally reselect accounts based upon segments.
4. Select the **Report Options** button to select the criteria. The following screen is displayed:



5. Select Report-Type:

1 - Next Year/Current Year Budget Analysis

Provides prior and current year revised budgets and expenditures for comparison against amounts budgeted in the specified Budget Projection.

2 - Next Year Budget Levels Report

Provides a comparison of prior and current year budgets to all next year budget levels in the selected Budget Projection.

3 - Next Year Budget Detail Report

Provides budget details entered for accounts with a given projection.

4 - Next Year Budget Historical Comparison

Provides a comparison of actual expenditures for three prior years and current year to the current year revised budget and a selected Budget Projection.

5 - Next Year Budget Comparison Report

Provides last year actual, current year revised budget and actual and up to 3 selectable budget levels from the projection.

6 – Future Years Report

Provides reporting for projections that contain future years budgets (2 years and beyond).

6. Based upon the report type selected, the following options may appear:

Budget Level: Indicate the budget level from the projection to report.

Percentage change calculation method:

Used to determine how to compute the percent next year's budget has changed. Suggest selecting 4- (Level – Revised)/Revised

Print first or second year of budget requests = First - Available in Type 1 – Next Year/Current Year Budget Analysis; Type 2 – Next Year Budget Levels Report; Type 5 – Next Year Budget Comparison Report

Detail lines:

Select Both, Denied or Approved. Only available with report type 3 – Next Year Budget Detail Report.

7. **Period Number:** Several of the report options provide access to the “Period number” field. This field is used to report current year expenses/revenues through a period. To report on expenses/revenues through the report date, place 99 in this field.
8. **Include cfwd in rev bud:** The field determines whether the revised budget figures on the report will reflect outstanding encumbrances carried forward from the prior year. The default is “Y” and should not be changed.
9. After selecting preferred options click **Accept** to return to the main report screen.
10. Select an output option to view the report.