

# Budget Preparation

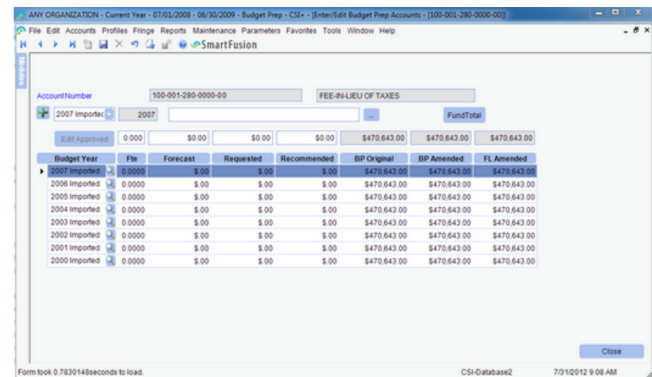
The Budget Preparation system is designed to assist the budget process outside of the Fund Ledger and Payroll/Personnel modules.

## Forecast Budget Needs

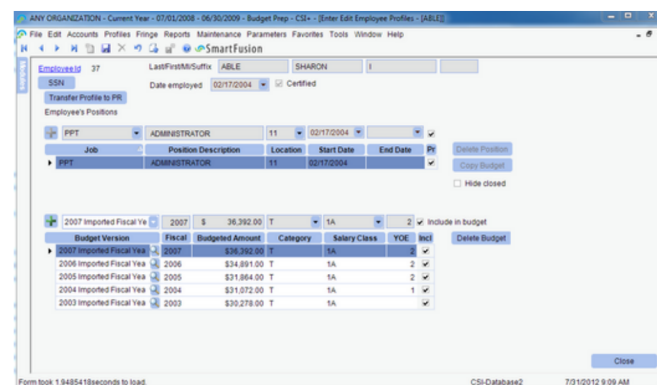
- Track requested, recommended and approved amounts for each revenue and expenditure account.
- Display comparative prior year budget history for each account.
- Allows restricted access for department staff to enter requested budget amounts and justification notes.
- Since budgets are normally for the following year, it is easy to change the system dates to work in a future period.
- Budgeted amounts for each ledger account can be automatically transferred to the Fund Ledger module to start the new fiscal year.

## Simplify Payroll Budgeting

- Build salary schedules to automatically compute budgeted salaries. When salary schedules are changed, all individual salaries can be recomputed to reflect the schedule changes. If a salary schedule is not applicable, the budgeted salary can be entered manually.
- Perform “what if” calculations and optionally update budgeted amounts based on the calculation.
- The Employee Profiles section includes a budget record for each employee that reflects base salary, salary supplements, fringe cost and the ledger accounts where salary and fringe will be allocated.
- When Employee Profiles are used, reports are available that will show, by employee name, the details for each budgeted salary account.
- Automatically transfer approved salaries to the Payroll module.
- Years of experience can be automatically incremented or decremented.
- Revenue & Expenditure Reports.
- Allows for multiple employee profiles.
- Allows for multiple budget versions.



**Budget Prep Accounts - Enter/Edit**



**Employee Profiles - Details**

## REPORTING

- Budget Comparison Report
- Annual Budget Estimate
- Budgeted Positions
- Budget Version Report
- Budget Version Comparison
- Five Budget Version Comparison
- Employee Profiles
- Employee by Account
- Accumulated Salaries/Positions
- Salary Schedule Report
- Salary Supplement Report
- Vacancy Report
- Overview Report
- Employee Position Report
- Unassigned Employees Report

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