

# Scenarios

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The Budgeting module may store multiple scenarios. Generally, a single scenario will be sufficient. However, special circumstances may require multiple scenarios based on different assumptions. For example, you may wish to create a scenario for "*Assuming Levy Passes*" and another "*Assuming Levy Fails*".

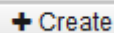
Each scenario consists of one or more budgeting Excel spreadsheets. A district may choose to use a single spreadsheet containing all accounts, or create a separate sheets for different management areas. For example, you might create a sheet for the high school, each elementary building and athletics. Each principal or supervisor could work on their own portion of the budget. Once the budgets are completed they can be loaded back into the system.

Once a scenario is completed and approved, a scenario can be "promoted" to the proposed amounts on the budget and revenue accounts.

## Create a Scenario

1. From the menu, select 'Budgeting' and click on 'Scenarios'. This will display the existing scenarios on the grid.

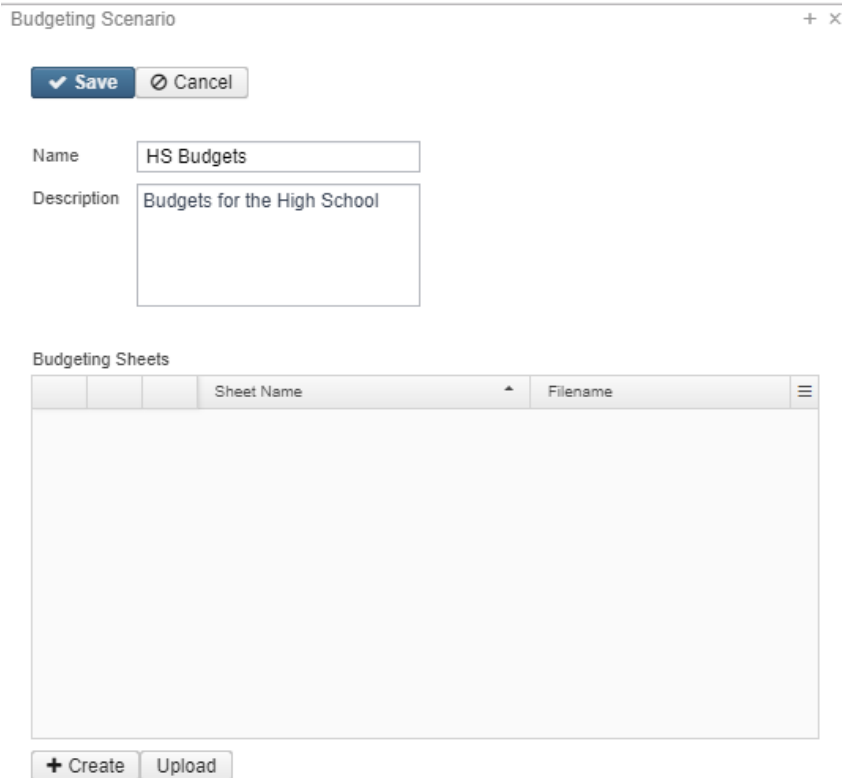
2. To create a scenario, click on



1. Enter a name for the scenario.

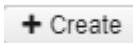
2. Enter a description of the scenario.

1. NOTE: There is no limit to the number of characters, numbers or spaces you want to use in the name.



The screenshot shows a web form for creating a scenario. At the top, there is a header bar with the text "Budgeting Scenario" and a close button "x". Below the header, there are two buttons: "Save" (with a checkmark icon) and "Cancel" (with a close icon). The form has two main sections. The first section is for the scenario details, with a "Name" field containing "HS Budgets" and a "Description" field containing "Budgets for the High School". The second section is titled "Budgeting Sheets" and contains a table with two columns: "Sheet Name" and "Filename". The table is currently empty. At the bottom of the form, there are two buttons: "Create" (with a plus icon) and "Upload".

3. At this point, you can either save the scenario by clicking on  and create budgeting spreadsheets at a later time; or

continue on by creating budgeting spreadsheets for this scenario using the  option.

# Creating spreadsheets for a Scenario

When editing a scenario, click on  at the bottom of the screen to create a budgeting sheet for the scenario.

1. Select the type of Budgeting Sheet: Budget or Anticipated Revenue.
2. A predefined set of properties are displayed. From there, you can add or remove the properties you would like included on the spreadsheet.

Create New Budgeting Sheet + ×

Select Type  
Budget ▼ Sheet Name HS Athletics ✓ Save Sheet Restore Defaults

Select Properties Configure Filters

Properties:

Display Name	Description	Remove
Id	id	<span>×</span>
Fund	Fund	<span>×</span>
Func	Func	<span>×</span>
Object	Object	<span>×</span>
SCC	SCC	<span>×</span>
Subject	Subject	<span>×</span>
OPU	OPU	<span>×</span>
IL	IL	<span>×</span>
Job	Job	<span>×</span>
Description	Description	<span>×</span>
FYTD Expendable	FYTD Expendable	<span>×</span>
FYTD Expended	FYTD Expended	<span>×</span>
Encumbrance	Encumbrance	<span>×</span>
FYTD Unencumbered	FYTD Unencumbered	<span>×</span>

3. Click on 'Configure Filters' tab if you would like to filter data being extracted.


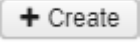
Create New Budgeting Sheet + ×

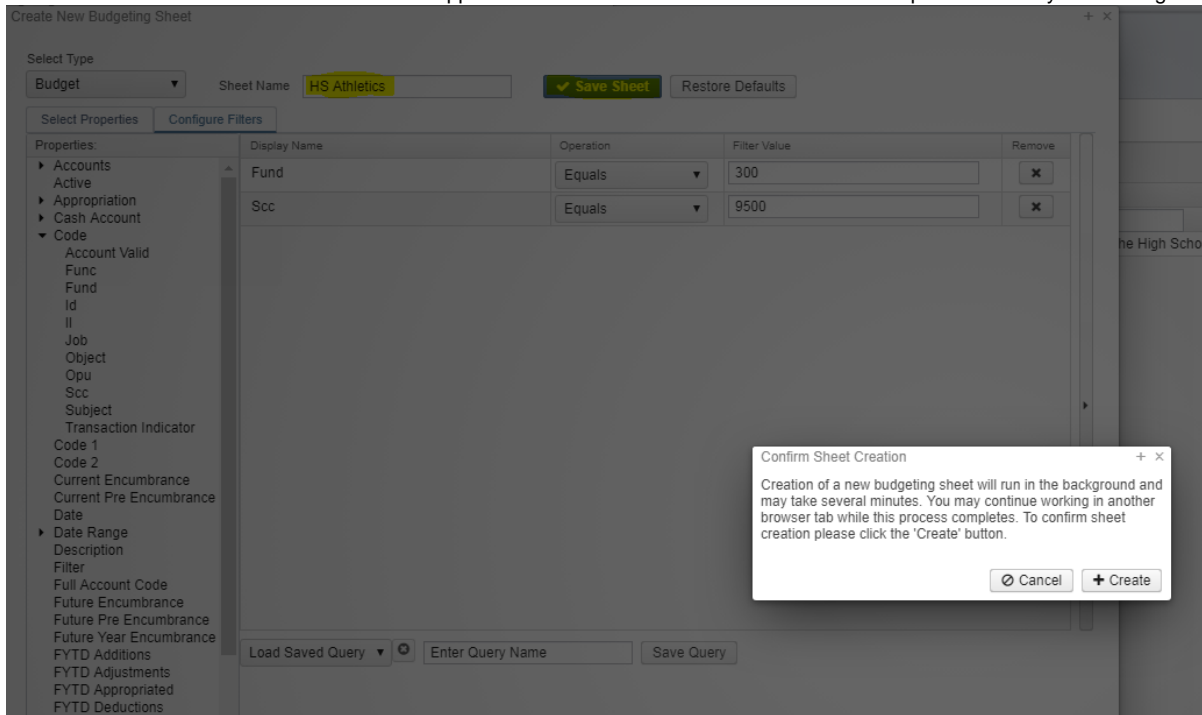
Select Type  
Budget ▼ Sheet Name HS Athletics ✓ Save Sheet Restore Defaults

Select Properties Configure Filters

Properties:

Display Name	Operation	Filter Value	Remove
Fund	Equals <span>▼</span>	300	<span>×</span>
Scc	Equals <span>▼</span>	9500	<span>×</span>


4. To save the spreadsheet, enter a name under 'Sheet Name'. Click on  to save your budgeting sheet to the scenario. A 'Confirm Sheet Creation' box will appear. Click on  to add the new spreadsheet to your existing scenario.

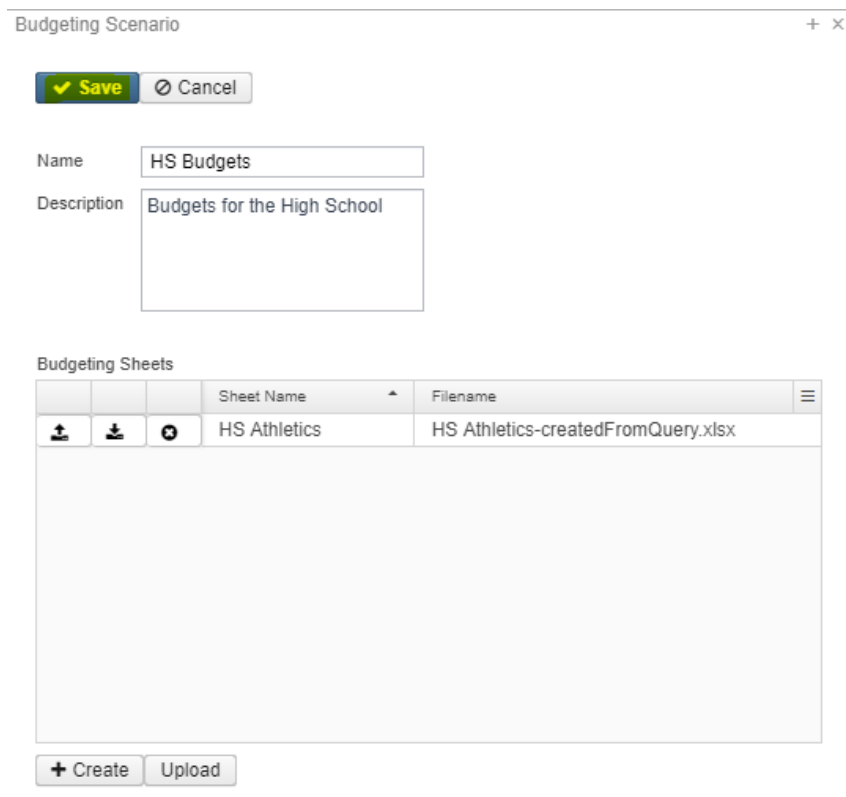


The 'Create New Budgeting Sheet' dialog box is shown. It has a 'Select Type' dropdown set to 'Budget' and a 'Sheet Name' field containing 'HS Athletics'. There are 'Save Sheet' and 'Restore Defaults' buttons. Below this is a 'Configure Filters' section with a tree view on the left and a table on the right.

Properties:	Display Name	Operation	Filter Value	Remove
Fund	Fund	Equals	300	X
Scc	Scc	Equals	9500	X




A 'Confirm Sheet Creation' modal box is overlaid on the right. It contains the text: 'Creation of a new budgeting sheet will run in the background and may take several minutes. You may continue working in another browser tab while this process completes. To confirm sheet creation please click the 'Create' button.' It has 'Cancel' and 'Create' buttons.

4. The new budgeting sheet will be displayed under the Budgeting Sheets table. Click on  to save the changes made to the scenario.





The 'Budgeting Scenario' dialog box is shown. It has a 'Save' button and a 'Cancel' button. Below them are fields for 'Name' (containing 'HS Budgets') and 'Description' (containing 'Budgets for the High School').

Below the description field is a table titled 'Budgeting Sheets'.

	Sheet Name	Filename
  	HS Athletics	HS Athletics-createdFromQuery.xlsx

At the bottom of the dialog are '+ Create' and 'Upload' buttons.

## Download Scenario Spreadsheets to Excel

1. Click on  to view the scenario.
2. Click on  to download a specific spreadsheet in the scenario to your computer. Save the spreadsheet and open it in EXCEL.
3. Enter in your proposed amounts. For this example, the NYP-2018 is used to enter next year proposed amounts for FY2018. You can enter each NYP amount manually or, in my example below, use a calculated formula (highlighted in yellow), to mass-calculate a percentage.
4. Once completed, save the change to the Excel spreadsheet.

HS Athletics - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles



Calibri 11

Normal Bad Neutral Calculation

N2  $=SUM(I2*1.03)$

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	id	Fund	Func	Object	SCC	Subject	OPU	IL	Job	FYTD Expendable	FYTD Expended	Encumbrance	FYTD Unencumbered	NYP-2018
2	0fb77b69-3f71-4eda-93ce-8d3a88af105f	300	4510	890	9500	000000	200	00	000	500.00	64.52	0.00	435.48	515.00
3	14503ebb-1cc2-4be3-ade4-5116dbc56490	300	4540	260	9500	000000	200	00	000	25.00	6.47	10.30	8.23	25.75
4	1499fd51-5943-4b7b-bddf-8b20204afa7c	300	4540	890	9500	000000	200	00	000	500.00	0.00	0.00	500.00	515.00
5	169d2016-b756-4441-b66b-10900f9d16eb	300	4540	143	9500	000000	200	00	000	1750.00	579.84	0.00	1170.16	1802.50
6	1ffacb1a-46e8-45dd-84a9-14626392aea6	300	4530	223	9500	000000	200	00	000	100.00	35.27	0.00	64.73	103.00

## Upload and Replace a Scenario spreadsheet


1. Click on  to edit the Scenario you want to upload the spreadsheet into.
2. Click on  to upload and replace the existing budgeting spreadsheet. A confirmation box is displayed stating it will overwrite the existing spreadsheet.

Budgeting Scenario + >

Name

Description

Budgeting Sheets

	Sheet Name	Filename
	HS Athletics	HS Athletics-createdFromQuery.xlsx

+ Create Upload

Confirm

×

Warning: This operation will overwrite existing sheet. Replace current sheet?

Cancel

Ok

- A 'Budgeting Scenario' box will then be displayed. Click on  to upload the saved spreadsheet on your computer.

Budgeting Scenario

Sheet Name \*

HS Athletics

Description

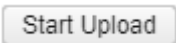

Upload

Choose File



HS Athletics.xlsx

Start Upload

Cancel





- Next, click on . The existing budgeting sheet has now been updated.
- Click on  to save the changes to your scenario.

## Promote a Scenario

- Click on  to promote all spreadsheets in the scenario to proposed amounts. A 'Confirm Promote' box will appear warning that if any existing proposed amounts exist, they will be replaced with the new figures. Click on .

Budgeting Scenarios

+ Create

				Name	Description
				HS Budgets	Budgets for the High School

Confirm Promote

+

×

Promotion will replace existing proposed amounts for fiscal years related to this scenario. Are you sure you want to promote the entries in this scenario to proposed amounts?

Cancel

Promote

- Once the amounts have been promoted, they will be available to view under the Proposed Amounts option under Budgeting. Click on [Proposed Amounts](#) for more information about the 'Proposed Amounts' option under the Budgeting menu.

+ Create

Apply

Fiscal Year 2018 ▾

			Fund	Func	Object	SCG	Subject	OPU	IL	Job	Amount
			300	4540	490	9500	000000	200	00	000	0.00
			300	4510	590	9500	000000	200	00	000	2,575.00
			300	4530	223	9500	000000	200	00	000	103.00
			300	4520	223	9500	000000	200	00	000	51.50

Delete a Scenario

1. Search desired scenario to delete.
2. Click on to delete the scenario. Click on 'delete' to confirm deletion.