



## Incode Budget Preparation

Tyler's INCODE Budget Preparation creates and maintains budgets for current and future fiscal years. Users can view previous year budgets and create models for future fiscal year budgets. A variety of reporting options gives users the freedom to customize budget spreadsheets to fit their needs. This module can accommodate up to 99 versions per fund, allowing multiple changes and user-defined scenarios. Budget Preparation integrates with INCODE General Ledger and Report Generator. Additionally, personnel budgets automatically transfer from our integrated Human Resources Position Control Budgeting module.

### Information & Reports

- Consolidates budget prep and analysis functions in one place, offering a variety of budget information views, budget comparisons, import tools, and convenient access to budget reports.
- Defines budget information views by fund, department, type, or accounts.
- Provides drilldown to supporting details, notes, and distribution of dollars from budget worksheet views.
- Allows users to edit budget information at the individual account level or for all accounts in a given fund or for a specific department.
- Reports budget projections through user-defined financial statement formats.
- Controls access to budget information so department heads can limit departmental budgets under their control.

### Transaction Efficiency

- Maintains ODBC interface compliance.
- Easily transfers data to third party applications like Microsoft® Excel, Access, and Word.
- Calculates projections based on other budgets or YTD balances with user-

defined multipliers and filters on cost centers and account segments.

- Imports personnel budgets from the HR Position Control Budgeting module.
- Automatically distributes budget amounts evenly to all months or to each month in proportion to the actual amounts from a historical year.
- Installs the adopted budget in a quick and simple process.
- Tracks all changes to the final approved budget as amendments with a complete audit trail and maintains them in an easily updated budget adjustment file.

### User Friendly

- User-defined system security controls access to the budgeting files.
- Accessibility to all revenue and expenditure line items, including future status line items intended for future budget periods.
- Easy line item grouping for budget control purposes.
- Flexible budget notes features including permanent, current, and next year notes at the line item, department, and fund level.
- Support for export and import of budgets with Microsoft Excel.