

## Schools Finance

### Cluster Budget Planner Additional Notes

The Cluster Budget Planner is an abridged version of the existing School Budget Planner, and as such, many of the functions performed within the Cluster Budget Planner can be carried out following the instructions given in the User Guide for the School Budget Planner.

These additional notes explain the differences between the Cluster and School Budget Planner. The main differences relate to the addition of department codes within the Cluster Budget Planner.

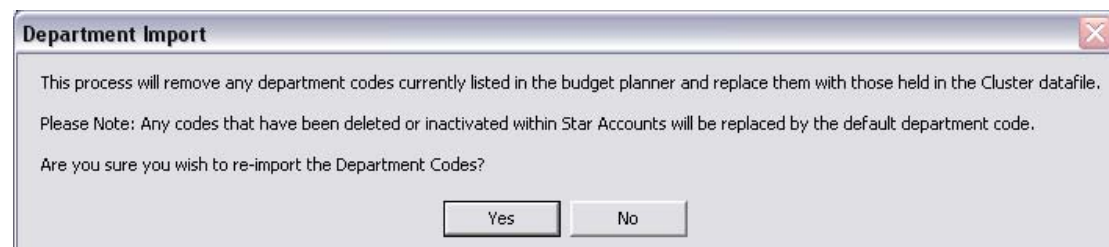
#### **Initial Set-Up**

The initial set-up procedures for the Cluster Budget Planner are the same as those shown in Section 1 of the School Budget Planner User Guide. In addition to these details a '**Default Department**' code is required. Any budget lines, or staffing forecasts, found within the Cluster Budget Planner without a department code will be assigned to this Department Code automatically when any validation or data updates are applied.

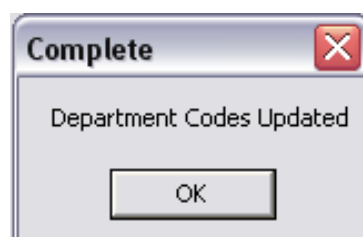
The Department Codes within the budget planner can only be imported from Star Accounts. Click '**Import Star Departments**'.

**Import Star Departments**

If a list of department codes has previously been imported into the Cluster Budget Planner the following message will appear:



Click '**Yes**' to continue or '**No**' to cancel. Please Note: If '**Yes**' is selected any departments that no longer exist, or have been made inactive, within Star Accounts will be removed from the Cluster Budget Planner. The default department code will replace any budgets or staff forecasts assigned to those departments within the Cluster Budget Planner.



Click '**OK**'.

## Schools Finance

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Select the required department code from the drop down list. It is recommended that the department chosen is the clusters generic department code, rather than one of the individual schools department code.

### **Building the Budget**

The procedure for entering budgets into the budget planner is the same as those listed in Section 2 of the School Budget Planner user guide, with the exception of the need for a department code to be selected on each line:

#### **BUDGET PLAN ORIGINAL 2012-13**

##### **3050 - NCC Thetford Cluster**

Subj Code	Subjective Description	CFR Department	2012-13 Original
98940	Budget Share	101 EB3050	-25,000
98950	8th Form Funding	102 EB1952	-3,500
98950	8th Form Funding	102 EB3050	-15,000
99020	16-19 Bursary Fund	102 EB3050	0

Select the required department from the drop down list.

An additional filter has been added to this screen to allow the screen to be filtered per department code.

**FILTERS**

CFR Group

Department

### **Support Staff Forecast**

The procedure for entering support staff forecasts is the same as those listed in Section 4 of the School Budget Planner user guide, with the exception of the need for a department code to be selected on each line:

When updating the detailed budget with Support Staff costs, the amounts entered will be shown at subjective and department code level.

# Schools Finance

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### Printing Budget Plans

All Budget Plans printed from the Cluster Budget Planner can be filtered per department code if required.

From the '**Budget Type**' form select the required department from the drop down list.

#### 3050 - NCC Thetford Cluster : EB1952 - Queensway Community Junior BUDGET PLAN ORIGINAL 2012-13

		2012-13
CFR Description		Original
I02	Funding for sixth form students	-3,500
	<b>Total Income</b>	<b>-3,500</b>
E03	Education Support Staff	4,164
E08	Indirect Employee Expenses	1,500
	<b>Total Expenditure</b>	<b>5,664</b>
	<b>NET EXPENDITURE</b>	<b>2,164</b>

**Reset**

Click '**Reset**' to view the full Budget Plan.