

Budget Construction Reference Guide

Overview

Budget Construction uses the position as a means to identify a collection of work related tasks specific to an organization. From the BC perspective, positions can be filled, vacant, not funded, active, deleted and frozen.

BC contains functionality that allows the user to add, update, and delete funding to/for/from positions. Funding adjustments to a filled position is also known as "setting the salary" for the individual.

Key Information

- Warning! Never close a browser window when waiting for a process to complete (especially when generating reports). Always use the buttons inside the application.
- Search icons are used to help find desired values.
- The seeding data queries, within the IUIE, provide an accurate data export for importing into the budget construction module.
- When setting salaries, budget dollars should equal percent and vice versa. The percent field was expanded to enable greater accuracy in reflecting fte and calculating standard hours for those individuals with split funding sources.
- To change a position from 12 to 10 months, a Maintain Position eDoc must be initiated and fully approved to enable the change to be updated in BC. To change the pay months, use the drop down option in the Work Period field and update. Use an effective date of 7/1/\$\$.
- To transfer an individual that is currently a 12 month appointment to a position which is currently 10 months, a Transfer eDoc is needed. Use an effective date of 7/1/\$\$ instead of 8/1/\$\$, if the intent is to prohibit the employee from receiving any pay for the month of July.

Accessing your accounts for budgeting

To access the budget construction module click, the "Kuali Financial System (Authorized Users) in One.IU. This tile will take you to the Kuali Enterprise Dashboard (KED).



• In the KED, select the "Budget" module from the left navigation pane.



• Within the Budget module, choose the "Budget Construction Selection" link from the list of Budget Activities.



• You need to pull documents up to your approval level to gain editaccess.

BC Fiscal Year: 2014				
Budget Construction Documer	it Open			
	my accounts my org	anization		
	* Chart	* Account	Sub Account	Action
		۲	۲	refresh load document
Sub-Fund Gr	oup:			
Current Year	Org:			
Rpts	5 To:			
Next Year	Org:			
Budget Construction Organiza	tion Salary Setting/Report/Control			
org salary settings	org report/dump request import	lock monitor payrate import/export load	org pull up	org push down
		close		

- To pull up to the Org Level click the org pull up button.
- The Organization Selection screen is displayed, select Both and click [pull up].

		expand all collapse
BC Pull Up Organization Selec	ection vide	
Current Point of View Organ	ization Selection	
	Select Point of View: Currently Selected:	
	NW-NW NW NW- NW (NORTHWEST CAMPUS)	
Organization Cub Terr		
Organization Sub-Tree Selected	Organization Sub-Tree	Action
Not Sel 💌	<u>NW</u> - <u>NW</u> NORTHWEST CAMPUS	ł
Not Sel Both	set org set sub org set org & sub org clear all	
Org Pull Up Can Sub Org	▼ hide	
Pull Up Candidates		
view	List Pullup Candidate Documents	
	pull up ctose	
	pull up close	

- The selected Pull Up was successful message will be returned.
- Click the **Close** button to return to the Budget Construction Selection screen.
- You can choose to budget your organization from an account list byclicking on the my organization button.

BC Fiscal Year: 2014				
Budget Construction Document Open				
	my accounts my	rorganization		
	* Chart	* Account	Sub Account	Action
		<u> </u>	9	refresh load document
Sub-Fund Grou	pt			
Current Year Or				
Rpts T Next Year Or				
org salary settings	org report/dump request import	lock monitor payrate import/export load	org pull u	p org push down
		(dose)		

- The Organization Dropdown will be displayed
- Click the Selected box by the Chart Org list
- To view a list of account click view Show Budgeted Accounts

	Select Point of View:	Currently Selected: <u>EA</u> - <u>EA</u> (EAST CAMPUS)	
Organization Sub-Tree Selected EA - EA	Org EAST CAMPUS	anization Sub-Tree	Action
	select all	clear all	
Select Operation	▼ hide		
Select Operation			
view	Show Budgeted Accounts		
	cios		

• The list of currently budgeted accounts (BC Documents) for your organization will be returned.

Construction Document 😰					Initiator: k	fs Creater	1: 01:35 PM 01/
					And doing the	Cicate	01.33 PH 01/
access granted.						exp	and all collapse
	Personal Andrew Person					-	chardeness to construct
Document Overview	▼ hide						
Document Overview							
	 Description: Budget Con 	structio	n 2014 EA 4769532		Explanation:	Budget Construction	
Organizatio	Document Number: 2014						
System Information	▼ hide						
		_					_
System Information	Fiscal Year:		2013				
	Chart/Account:	FA	4769532	TITLE III ADMINISTRATION	12		
	Sub-Account:	10	ADMIN	ADMINISTRATION	10		
	Sub-Fund Group:		STATEK	STATE OF INDIANA			
	Org:		AAQA	AREA IX IN HOME AN			
	Reports-To Chart/Org:	EA	EXEC	EXECUTIVE MANAGEMENT			
Next Year Data							
	Fiscal Year:		2014				
	Chart/Org:		AAQA	AREA IX IN HOME AN			
	Reports-To Chart/Org:	EA	EXEC	EXECUTIVE MANAGEMENT			
Approval Level Data							
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Controls	Level Chart/Org:	LA	LA	EAST CAMPUS			_
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Revenue (0)	+ show						
Expenditure (19,400)	show						
Notes and Attachments (0)	> show		1				
Route Lon	show						

- Work through the list by clicking on the Load Documentlink.
- Status "?" means the document has not been reviewed. If the document is in Status "R" it has been reviewed.
- You can also budget a single account.
- On the Budget Construction Selection screen enter the account number, optional sub-account, tab and then click the load document button.

BC Fiscal Year: 2014								
Budget Construction Document Open								
		y accounts my	organization					
	* ch	art		* Accoun	t	Sub	Account	Action
	EA EAST	4	769532 S	-10N '13		ADMIN ADMINI RA	S TION	refresh load document
Sub-Fund Group:								
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Budget Construction Organization Sala	ary Setting/Repor	t/Control						
org salary settings	org report/dump	request import	lock monitor	payrate import/export	load		org pull up	org push down
				close				

- A Budget Construction document for a single account is displayed.
- On this screen a single account can be pulled up to provide EditAccess.
- You can also choose to budget by position number or incumbent from the Budget Construction Selection screen.
- Click on the org salary settings button.

Sub-Fund Group: Current Year Org: Rpts To: Next Year Org:									
* Chart * Account Sub Account Act Sub-Fund Group: Sub-Fund Group: Sub-Fund Group: Sub-Fund Group: Sub-Fund Group: Current Year Org: Rpts To: Sub-Fund Group: Sub-Fund Group: Rest Year Org: Sub-Fund Group: Sub-Fund Group: Sub-Fund Group:									get Construction Document Open
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Budget Construction Organization Salary Setting/Report/Control							rt/Control	ary Setting/Report	get Construction Organization Sala
org salary settings org report/dump request import lock monitor payrate import/export load org pullup org push dowr	a down	org pus	org pull up	load	payrate import/export	lock monitor	request import	org report/dump	org salary settings
					Name of Street				×
					close				
close					close				

- Click the Selected box beside the Chart and Org.
- Click the view button for your selection of either Show Position Pick List or Show Incumbent Pick List. Depending on your selection, budgeted positions or incumbents for your selected organization will be displayed.

		Point of View: Currently Selected: A-EA EA EA.(EAST CAMPUS)	
organization Sub-Tree	EAST CAMPUS	Organization Sub-Tree	Action ‡
elect Operation	Show Position Pick List Show Incumbent Pick List		
		(close)	

• For either list enter selection criteria and click the search button to filter the results, wildcard characters are allowed.

		Pos	sition Number:						
			Position Type:	8					
		Positio	n Description:						
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			and the second	-	<u></u>			/	
			Dept.ID Org:	9			/		
			Salary SetId:			/	/		
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			Graday						
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32 items fou Actions	nd. Please refine your sear		down your search.		cancel extended	Salary SetId	Plan	Grade	Person Name
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• Click the **extended** button to list all incumbents or positions, including those funded outside your selected organization.

Entering Revenue

• To enter Revenue load the account and click the **b** show button on the Revenuetab.

System Information							
		Fiscal Year:	2013				
		Chart/Account: EW	9762174	FW-SOC	TOLOGY		
		Sub-Account:		1			
	5	Sub-Fund Group:	EXTAGY	EXTERN	AL AGENCY FUNDS		
		Org:	FW	FORT W	AYNE CAMPUS		
	Report	ts-To Chart/Org: IJ	UNIV	UNIVERS	SITY LEVEL		
Next Year Data							
		Fiscal Year:	2014				
		Chart/Org: EW	EW	FORT W	AYNE CAMPUS		
	Report	ts-To Chart/Org: IU	UNIV	UNIVERS	SITY LEVEL		
Approval Level Data				10.700.000			
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		and the second se	200				
	-	2:IU-UNIV UNIV	/ERSITY LEVEL 💌 [pull	up report/	dump		
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Revenue (0) Revenue	SubObject		/ERSITY LEVEL 👤 pull		96 Change		Action
Revenue (0)	Les	 hide Base Budget 		up report/s	% Change		
Revenue (0)	SubObject	▼ hide				_create month	Action
Revenue (0) Revenue	SubObject	 hide Base Budget 355,035 		0	% Change -100.00		Action
Revenue (0) Revenue Add: * Object IB00 OTR& INC	SubObject	 hide Base Budget 		0	% Change		Action
Revenue (0) Revenue Add: * Object IB00 OTR& INC	SubObject	 hide Base Budget 355,035 355,035 	* Requested	0 0 0	% Change -100.00	create month	Action add bat inquiry
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Revenue (0) Revenue Add: 0bject 0000 0	SubObject	 hide Base Budget 355,035 355,035 Adjust show 	* Requested	0 0 0	% Change -100.00	create month	Action add bat inquiry

• Once you have completed setting the Revenue click **____** and **___** back to the Budget Construction Selection screen.

Entering Expenditures

- While you have access to update the budget construction application, expenditure objects can be imported (with the exception of salary objects) or manually entered in the expenditure request fields.
- When using the Global Adjust By Percent function to fill the expenditure request fields, zero out the salary request and click save to allow setting salaries.

Expendit	ure					show % adjust hide detail
-	* Object	SubObject	* Base Budget	Requested	% Change	Action
Add:	9	9		0		add
	2400	553	74,000	74,000	0.00	create month bal inquiry show benefits salary setting
	2500	2427	63,169	63,169	, 0.00	create month bal inquiry show benefits salary setting
	4078 CONF/WRXSHP5		1,500	1,500	0.00	create month bal inquiry
	4085		1,320	1,320	0.00	create month bal inquiry
	4086		75	75	0.00	create month bal inquiry
	4100 off supplies	***	582	582	0.00	create month bal inquiry
	4166 PRINT/DUP	***	736	736	0.00	create month bal inquiry
	4300_	272)	200	200	0.00	create month bal inquiry
	4777		665	665	0.00	create month bal inquiry
	4871 BACKGRD CK	***	7,500	7,500	0.00	create month bal inquiry
	5050	***	140	140	0.00	create month bal inquiry
	5625 FRAG BEN CST	***	27,996	0	-100.00	bal inquiry
	5760		9,602	0	-100.00	bel inquiry
	5772		11,788	0	-100.00	bat inquiry
	5773		7,991	0	-100.00	bai inquiry
	6000 INDY TRVL		1,000	1,000	0.00	create month bal inquiry
	7900 UNAL BAL	7%	-611	-611	0.00	create month bal inquiry
	9977 BUD ALLOT EX	HMS	1,000	1,000	0.00	create month bal inquiry
	Land Handling	Expenditure Totals	208,653	151.276	(27.50)	

Salary Setting

• For quick salary setting click the salary setting link.

			Sub-Fund Grou		EXTAGY	EX	CTERNAL AGENCY FUNDS			
			On		EW		ORT WAYNE CAMPUS			
			Reports-To Chart/Or	g: <u>IU</u>	UNIV	UN	IVERSITY LEVEL			
Next Year	r Data									
			Fiscal Yea		2014					
			Chart/Or		EW		ORT WAYNE CAMPUS			
			Reports-To Chart/Or	g: <u>IU</u>	UNIV	UN	IVERSITY LEVEL			
Approval	Level Data						1 X 1 M			
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			2:IU-	UNIV UNIVE	RSITY LEVEL	· pull up re	nport/dump			
Revenue	(0)		+ show							
nevenue	(0)									
Expenditu	ire (0)		🖛 hida							
Expendit	ure									show % adjust hide detail
	* Object	SubObject	* Base Budget	* Requ	ested	% Change			Action	
Add:		9			0				add	
	2000		247,687		0	-100.0	create month	bal inquiry	show benefits	salary setting
	5625 FRNG BEN CST	442)	50,553		0	-100.0	00	bal inquiry		
	5760 FICA	***)	17,338		0	-100.0	00	bal inquiry		
	5772 RETIRE EXMPT		39,457		0	-100.0	00	bal inquiry		
		Expenditure Totals	355,035		0	(100.00)			
Global Ex	penditure Action	15								
			Adjust By P	ercent:	apply		refresh	month spread	month delete	calculate benefits
Notes and	I Attachments (0)	+ show							
		57	(a share)							
Route Lo	9/1		+ show							

• Detailed funding lines for the account, object, incumbent and position are displayed.

Ouic	k Salary Se	etting			hide	1								
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Exp	enditure Sa	alary Line	-	_	_	_	_	-	_	_	_	_	_	_
Statistics.cl	Chart	Account	_	SubAcco	unt		Object		SubO	bject	Su	bFundGrpCd		Org
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100411		1. TT CARL AND A DIST.				The second second	add position	ad	d incumbent		11			
										-				
Sala	ry Line De	lail												show %
Del	Position	Name	Cls	Salary	Salary	Work Months	Pay Months	CSF Amt	CSF FTE	* Funding Month	* Requested Salary	Requested	Change	
E	00013831	CODISPOTI,MARGIT E.	LC	AC1	LTX	12	12		1.00000	12	0	1.00000 (100.0		In Paraton memory and an encounter of
		2011 (D.2.10) (D.1.10)		12										vacate delete
	00014117	SKEKLOFF.SUSAN DIAN	LLC	AC1	LTX.	12	12		1.00000	12	0	5 1.00000 (100.0		posn salset incmbn vacate delete
	00014316	TRUESDELL, CHERYL B.	ц.	AC1	AAL	12	12		1.00000	12	0	1.00000	(100.00)	posn salset incmbn
			-			L	Total:		3.00000	2	0	3.00000	(100.00)	Incompany in the second
					Ехр	enditure I	ine Base:		the second se		0		(100.00)	
Glob	al Actions													
								Adju	st: % 💌	1.5	apply	Refresh	Position?	Refresh Incumb

- To apply a percentage increase across the board (globally) enter the percentage amount, click apply and [save]
- To apply a percentage increase to individual employee lines click the show % adjust button.

Quic	k Salary Se	tting			▼ hide	<u> </u>									
Expe	nditure Sa	lary Line					10000 1000								
FW	Chart	Account 9762701		SubAc	count	2000	Object			ubObject	EXTERNAL A		FundGrpCd	60007	Org
FORT V	VAVNE	FW-LIBRARY				ACADENIC	SALARY add positie	00 00	ld incumbe	ntil	EXTERNAL A	COSNET 8	UNDS	PORT	WAYNE CAMPUS
		-	_					const 1.20							\sim
Del	ry Line Det	Name	Cls	Salary Plan	Salary Grade	Work Months	Pay Months	CSF Amt	CSI FTE	Funding Month	Reque	sted	Requested FTE	Change Percent	Actions
11	00013831	CODISPOTI,MARGIT E.	LC.	ACL	LTX.	12	12		3 1.000			0	1.00000	(100.00)	posn salset incribit salset
										Adjust: %	•		apply		vacate delete
Π	00014117	SKEKLOFF, SUSAN DIANE	LC.	AC1	LTX.	12	12		2 1.000			0	and the second s	(100.00)	posn selset incmbnt selset
										Adjust: %	-		apply		vacate delete
111	00014316	TRUESDELL, CHERYL B.	щ	AC1	AAL.	12	12		8 1.000			0		(100.00)	posn salset Incmbnt salset
										Adjust: %	<u> </u>		apply		vacate delete
						Expenditure	Total:		3.000 Re	2.61		0	3.00000	(100.00)	
Glob	al Actions														
								A	ljust: %		apply		C Refresh Po	isition?	Refresh Incumbent?

- To view all the funding lines for an employee or to budget an individual employee line click the button.
- The Salary Setting by Incumbent screen is displayed.

											expand	all collapse
Incumb	ent											
Incumb	ent		_		_		_	_	_	_		
-	• 6	nplid: 0000607	963		Nam	e: NUSBAU	MER,M R				Cis: PF	2
	Sal	Setid: IUFWA			Pla	n: AC1					Sal Grade: 📋	X.
Incumb	ent Funding		▼ hide									
v nide	Add Funding											
Det		Account	Sub Account	* Object	Sub	Object	Positio	n	Work Months	Pay Months	FTE	Post
		9	0	9		9		8				
			Row Operatio	n	Amount	Hourly	Months	Percent Time	FTE	Reason Select	Reason Amount	1
	Req	uest:			[[
	Leave Request	CSF: NONE	Ī		-							
	Total Inter	ided:			[1						
												add
	FW, 9762174,, 2											
Del	* Chart * FW9762	Account	Sub Account	* Object	Sub Ol		Position 00007158		Work Months	Pay Months	FTE	Post
同	FORT WAYNE FW-S	DETOLOGY		2000 ACAD SALARY			ACULTY/INST	RUCTOR 10	8	10	1	ET1.
			Row Operatio	n	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason	
		CSF: Adjust:	16 💌	apply				100.0	0 1.00000			
	Req	uest:			C	j o	10	100.00	1.00000		1	0
	Leave Request	CSF: NONE	1			5		0.0	0.00000			
	Total Inter	the second s				0			0.00000			-

- To add the new request amount enter it on the requestline.
- To add additional funding (split funding) complete the Add Funding section and click the add button.
- Use the Total Intended field when a position is split funded between two or more accounts or funded for less than 100%.
- When split funded, the total intended should be entered on **all** accounts budgeted.

Del	* Chart	* Accor	unt Sub Account	* Object	Sub Obje	ct	Position		Work Months	Pay Months	FTE	Post
E	FW. FORT WAYNE	9762174 FW-SOCIOLOG	5Y	2000_ ACAD SALARY			00007158 FACULTY/INST	IUCTOR 10		10	1	ET1
			Row Opera	ation	Amount	Hourly	Months	Percent Time	FTE	Reason Select	Reason	1
		CSF:	Adjust: % 🔳	apply	77,706			100.00	1.00000		Junount	1
		Request:		<	70.985	> °	10	90	0.90000	PRO Promotion - Academic Only	1,16	6
	Leave R	equest CSF:	NONE		0			0	0.00000	500		
	Tot	al Intended:			0				0.00000			1
												delet
			, 0000607963, 000071									
Del	* Chart	* Acco	unt Sub Account	* Object	Sub Obje	ect	Position		Work Months	Pay Months	FTE	Post
	FORT WAYNE	9762701 PW-LIBRARY		ACAD SALARY			00007158_ FACULTY/INSTI	RUCTOR 10		10	1	FT1
			Row Oper-	ation	Amount	Hourly	Months	Percent Time	FTE	Reason Select	Reason Amount	
		Request:			7.887		10	10	0.10000	2		
	Leave R	equest CSF;	NONE		0			0	0.00000			1
	Tot	al Intended:			78,872	>			0			
											pu	rge delet
♥ hide	Totals											
	6				Amount			Standard Hours	FTE			
	_	CSF:			77,706			40.00				
		Request:			78,872			40.00				
	Leaves F	equest CSF;			C			0.00	0.00000			1
Design of the	Appointment F	and the second	Est	wini l								

• When the position is budgeted click **save** and **close** to return to the quick salary setting screen.

Quic	k Salary Se	etting		1	 hide 	<u> </u>									
_															
Ехр	enditure Sa Chart	alary Line Account	_	SubAc	tount		Object	-	SubC	bject	Su	bFundGrpCd		0	rg
FW_	WAYNE	9762174 PW-SOCIOLOGY		000710		2000 ACADEMIC				ojeci	EXTERNAL AGENC		FQI	RT WAYNE CAMPL	
		Transferred and				Turnerente	add positio	n ad	d incumbent						
Sala	ry Line Det	ail	_	_	_			_						-	show % adjust
Del	Position		Cls	Salary Plan	Salary Grade	Work Months	Pay Months	CSF Amt	CSF FTE	* Funding Month	* Requested Salary	Requested	Change		tions
E	00007158	NUSBAUMER.M.R.	<u>PR</u>	AC1	FIX.	10	10		1.00000	10	Contrary (1.00000	1.50	posn salset vacate dele	incmbnt salset
	00007174	ASHTON.PATRICK JAMES	PC	AC1	ETX.	10	10		1.00000	10		1.00000	1.50	posn salset vacate dek	incmbnt salset
	00013595	IADICOLA.PETER	PR.	AC1	FTX.	12	12		1.00000	12		1.00000	1.50	posn salset vacate dele	incmbnt salset
							Total:		3.00000			3.00000	1.50		
Glob	al Actions		-	_	Ex	penditure	Line Base:		Req:			No.	3.71	-	_
Choic	ar Actions							Adju	ıst: % 💌		apply	Refresh	Position?	Refresh I	ocumbent?
								we d	050						

- On this page are the Actions of add position and add incumbent.
- To change the funding for a position click the add position button. A list of positions will be return. To immediately move to a particular position number, enter the position number and click search.

Action University Position Department Responsibility Position Regular Salary Salary Plan Salary Grade Union Conndential Effect Position Regular State State Code State Code State State Code State State Code Sta					University F	iscal Year:	2014									
Department set Id: Dept.ID Chart: Dept.ID Chart: Dept.ID Org: Besponsibility Center Code: Position Description: Salary Set Id: Position Salary Grade Default: Position Salary Grade Default: Position Salary Grade Default: Position Salary Grade Default: Position Code: Search Clear Cancel get new Search Clear Salary Sea Id Default Default Code Confidential Default Code Stat State State St					Positio	n Number:	00016995									
Dept.ID Chart: Image: Control of the second sec					Posi	ition Type:	3	0								
Dept.ID Org: Second					Departme	ent Set Id:	ļ — 1									
Responsibility Center Code: Position Description: Salary Set Id: Salary Set Id: Position Salary Plan Default: Position Salary Grade Default: Position Vinion Code: Search Clear Control Line: Search Clear Search Clear Search Clear Search Clear Search Clear Search Search					Dept	ID Chart:	l.		9							
Position Description: Salary Set Id: Position Salary Grade Default: Position Salary Grade Default: Position Union Code: Search Clear Cancel get new Section University Position Position Department Responsibility Position Position Responsibility Center Code Position Responsibility Center Code Description Responsibility Center Code Default Code Default Code Default Code Confidential Position Section University Position Position Sectual Default Code Confidential Effection States States Code Code Code Code Code Code Code Code																
Salary Set Id: Position Salary Grade Default: Position Union Code: Search Clear Cancel Ont new Section University Position Position Department Responsibility Position Position Department Responsibility Center Code Description Set A B B Set Id Department Responsibility Center Code Description Set A B B Set Id Default Confidential Position Position Default Code Confidential Position Position Default Code Confidential Position Position Default Code Confidential Position Set A B B Set Id Default Code Confidential Position Position Default Code Confidential Position Position Default Code Confidential Position Position Default Code Confidential Position Position Default Code Code Code Code Code Code Code Code				Res	-		9									
Position Salary Plan Default:																
Position Salary Grade Default: Position Union Code: search clear cancel get new clear cancel get new clear cancel get new Ction Position Position <t< td=""><td></td><td></td><td></td><td></td><td></td><td>and a second second</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></t<>						and a second										
University Position Department Position Department Responsibility Position Position<						and the second second										
Citizent Citizent Cancel Get new Action University Fiscal Year Position Position Department Position Department Position Center Code Position Description Salary Set Lit Position Default				Positi				8								
ction University Position Position Department Set Id Department Identifier Set Id Department Identifier Set Id Assistant Assistant					Position Ur	nion Code:										
Letion Linkensky Position Posi							C	search (c	tear) cancel	get new						
Letion Linkensky Position Posi																
ASSISTANT	ction	University Fiscal Year	Position Number	Position Type	Department Set Id	Departme	ent Ro	sponsibility enter Code	Position Description	Regular	Salary Set 1d	Salary Plan	Salary Grade	Position Union Code	Confidential Position	Position Effective Status
an 1014 00016995 SM TUBLA BL-BAP Z4 VICE R TUBLA PAE XX No A State	<u>lset</u> sn	:014	00016995	SM	IUBLA	BL-BAP	74		VICE	R	IUBLA	PAE	xx		No	^

- To return the position information to your salary setting page click the Posn Salset link. The Posn Salset w/sync links will **NOT** be used unless instructed to do so by the campus budget office.
- When selecting the Posn Salset link, the salary setting by position screen is displayed for that position number and the account you are currently on will default into the account field. Update the request, months, percent time etc. click add button then click the save button.

	* Y	ear: 2014		Position:	00016995	2 I		Position Desc:	ASSISTANT VICE PRI	ESIDENT	
	Default Object Co	ode: 2400	Depart	ment Identifier:	BL-BAP		Jot	Code Set Id:	IUBLA		
	Job Co	de: 001874		Salary Plan:				Salary Grade:	XX.		
	Work Mon	2 (2 2) (C		Pay Months:			St	andard Hours:	40.00		
	F	TE: 1.00		Pos Eff Date:	03/20/201	2					
Position	Funding	Đ	• hide								
≠ hide	Add Funding										
Del		Account	Sub Acco		* Object		Sub Object	* Empl		Cls	Post
П	UNIV ADMIN UNIVE	201 SITY BUDGET OFFICE		3 2 P	400	[0		9		
		Row Op	eration	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount	
	Request:				[-		
	Leave Request CSF;	NONE .		ĺ.							
	Total Intended:										
											add
• hide	BL, 1020200,, 2400, -	-, 0001785912, 00016	995								
Del	* Chart	* Account	Sub Account		Object		ıb Object	* Emplid		Cls	Post
E	BLOOMINGTON	UDGETARY AFFAIRS		2400 EXMPT	STAFF			0001785912 GERSTMAN,ROSA		•	
		Row Op	eration	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason	
	CSF:	Adjust: %	apply	77,875			50.00	0.50000			
	Request:				j O	12	50.00	0.50000		ſ	0
	Leave Request CSF:	NONE -			<u>[]</u>		0.00	0.00000			
	Total Intended:				ĵ			0.00000	1		
										177	
										V	acate delete

- To budget a position that has been saved to people soft since the previous refresh click the add position button.
- The Budget Construction Position Lookup screen is displayed. Enter the new position number and click the get new button.

				University F	iscal Year: 2014	9								
					n Number: 00038									
				Pos	ition Type:	9								
				Departm	ent Set Id:									
				Dep	t.ID Chart:		- (
				De	ept.ID Org:	9								
			Re	sponsibility Ce	nter Code:	9								
				Position D	escription:									
				Sal	ary Set Id:									
			Pos	ition Salary Pla	an Default:	9								
			Positi	on Salary Grad	de Default:	9								
				Position U	nion Code:									
						search	ear cancel	get new						
Actions	University Fiscal Year	Position Number	Position Type	Department Set Id	Position Department Identifier	Responsibility Center Code	Position Description	Position Regular Temporary	Salary Set Id	Position Salary Plan Default	Position Salary Grade Default	Position Union Code	Confidential Position	Positio Effectiv Status
set set set set sync	2014	00038285	SM	IUBLA	UA-BUDU	92	<u>FINANCIAL</u> MGR	R	IUBLA	PAE	4AD		No	A

- The position will be returned to the account you are working with to allow salary setting.
- Once salaries are set for the account click **_____** and return to the Quick Salary Setting screen.
- When the salary setting is complete click **save** and **close** to return to the account Budget Construction document.
- Note that a 2PLG object code has been generated to offset the salary request that has been entered. Verify whether or not you need to adjust the budget and then delete the 2PLG row.

Budget Construction Position Lookup

			Org	: EV	AI .	FORT	WAYNE CAMPUS			
			Reports-To Chart/Org		NIV		RSITY LEVEL			
Next Year Da	ata		Reports to chard org	48 8	SAL.	onite	SOUTH GEVEN			
CONCERNMENT OF	1.12		Fiscal Year:	: 20	014			_		
			Chart/Org:	EW EX	N	FORT	WAYNE CAMPUS			
			Reports-To Chart/Org	: <u>tu ut</u>	NIV	UNIVE	RSITY LEVEL			
Approval Lev	vel Data						1			
			Current Level			Accou	nt Level Update Access			
	_	_	Level Chart/Org	6	_			_	_	
Controls						inclusion and an other	A constant			
			2:10-0	NIV UNIVERS	TTY LEVEL	pull up report	/dump			
Revenue (0)			> show							
			· hide							
Expenditure	(0)		- nice							
Expenditure				12440.000000		NAME AND ADDRESS OF			AND REPORT	show % adjust hide detail
Add:	* Object	SubObject	* Base Budget	* Request	ted 0	% Change			Action	
1201016				-					and the second s	5 30 - 75 - 51
20	000	***	247,687	21	256,887	3.71	create month ba	Inquiry	show benefits	salary setting
28	ALG_	***	0	59	-368,222		ba	inquiry		delete
56	S25_ NG BEN CST		50,553		52,431	3.71	ba	l inquiry		
	760		17,338		17,982	3.71	ba	inquiry		
			39,457		40,922	3.71	ba	inquiry		
57 F10			0.01							
57 F10	TIRE EXMPT	Expenditure Totals	355,035	-	0	(100.00)				
57 F10	TIRE EXMPT	Expenditure Totals		_	0.000	(100.00)				_
57 FIC 57 RE	TIRE EXMPT	Expenditure Totals		cent:	0.000	(100.00)	refresh mon	h spread	month delete	calculate benefits
57 FIC 57 RE	772_ TIRE DONPT	Expenditure Totals	355,035	cent:	0	(100.00)	[refresh] mont	h spread	month delete	calculate benefits
Global Exper	772_ TIRE DONPT	Expenditure Totals	355,035 Adjust By Per	cent:	0	(100.00)	[refrest:] mon	th spread	month delete	calculate benefits
SZ FIC SZ RE Global Exper	772_ TIRE DONPT	Expenditure Totals	335,035 Adjust By Per	cent:	0	(100.00)	[refresh] mon	h spread	month delete	calculate benefits

- When entering expenditure request to add an additional object code complete the Add line making sure to click the add button.
- Click the save and close buttons to return to the Main Budget Construction Selection screen.

Printing Reports

Warning! Never close a browser window when waiting for a process to complete (especially when generating reports). Always use the buttons inside the application.

• To print reports at the Organization level, click the org report/dump button on the Budget Construction Selection screen.

BC Fiscal Year: 2014				
Budget Construction Document Op	en			
	my accounts	my organization		
	Chart	Account	Sub Account	Action
	UNIV ADMIN	1912201 SUDGET OFFICE	0	refresh load document
Sub-Fund Group:	GENFND		GENERAL FUNDS	
Current Year Org:	1	BUDU	UNIVERSITY BUDGET O	OFFICE
Rpts To:	UA.	CTRL	CTRL	
Next Year Org:	UA.	BUDU	UNIVERSITY BUDGET O	DFFICE
Rpts To:	UA.	CTRL	OFFICE OF THE CONTR	OLLER

• Select your point of view.

		Select Point of View: Currently Selected:	
Previou	s Branches	Chart/Org Organization	n
1	IU UNIV.	UNIVERSITY LEVEL	
	ation Sub-Tree		
Selecte		Organization Sub-Tree	Action
	<u>BL - BL</u>	BLOOMINGTON CAMPUS	
Post I	SACE EA	EAST CAMPUS	•
1	EW EW_	FORT WAYNE CAMPUS	(*)
F	IN IN.	IND UNIV-PURDUE UNIV INDPLS	•
	IU IU2.	IU2 DEPARTMENT	
	<u>KO KO_</u>	KOKOMO CAMPUS	+
	<u>NW</u> - <u>NW</u>	NORTHWEST CAMPUS	
	SB - SB	SOUTH BEND CAMPUS	
	SE. · SE.	SOUTHEAST CAMPUS	
	UA - UA	UNIVERSITY ADMINISTRATION	+
	194	select all clear all	
	And Exports	(• hule	
Reports	VIEW	Account Funding Detail	
	view	Account Object Detail (consolidated)	
	view	Account Summary (consolidated)	
	View	Level Summary	

- Click the view button beside the report you want to run. REMEMBER wait for the process to complete and not close the browser window.
- Always run the 2PLG report to verify all have been handled.

						a Universit PERATING BUI
Organization Sel	ection	6				
Chart:	FW	FORT	WAYNE			
Organization:	FW	FORT	WAYNE	CAMPUS		
Chart:	FW FORT WAYNE					
					2	013-14
Account / Sub:	Accou	nt/Sub	Name		Req	. Amount
9762204	MANAC	EMENT &	MARKE	TING		-343,007
9762701	FW-L1	BRARY				-317,414

- Reports are returned in PDF format.
- When running Salary reports you have the option to eliminate Reason Codes from the results.

	Chart/		
	UNIV	UNIVERSITY LEVEL	
Organization Sub-Tre	ee		
Selected		Organization Sub-Tree BLOOMINGTON CAMPUS	Action
It EA.		EAST CAMPUS	100
EW EV		FORT WAYNE CAMPUS	(+)
I IN - IN		IND UNIV-PURDUE UNIV INDPLS	
1U 1U2		IU2 DEPARTMENT	
КО КО.		KOKOMO CAMPUS	
NW - NW		NORTHWEST CAMPUS	
SB SB.		SOUTH BEND CAMPUS	
SE SE.		SOUTHEAST CAMPUS	+
T UA UA.		UNIVERSITY ADMINISTRATION	1
Reports And Exports	5	select all dear all	1
Reports And Exports	lu -	select all clear all	1 8
Reports And Exports		select all [dear all]	
Reports And Exports Reports	Account Funding De	select all [clear all	
Reports And Exports Reports	Account Funding De Account Object Deta	select all [char all hide tal d [(consolidated)	
Reports And Exports Reports 	Account Funding De Account Object Deta Account Summary	select all [clear all	
Reports And Exports Reports View View View	Account Funding De Account Object Deta	select all [char all hide tal d [(consolidated)	
Reports And Exports Reports View View View View	Account Funding De Account Object Deta Account Summary Level Summary List 2PLG	select all dear all I hide tal (consolidated) (consolidated)	
Reports And Exports Reports View View View View View View View View	Account Funding De Account Object Det Account Summary Level Summary Les 2PLG Monthly Object Sum	select all dear all	
Reports And Exports Reports View View View View View View View View	Account Funding De Account Object Deta Account Summary Level Summary List 2PLG	select all [dear all] tal all [consolidated] (consolidated) (consolidated)	
Reports And Exports Reports View View View View View View View View	Account Funding De Account Object Det Account Summary Level Summary List 2PLG Monthly Object Sum Object Summary	select all [dear all] tal all [consolidated] (consolidated) (consolidated)	
Reports And Exports Reports Veew Veew Veew Veew Veew Veew Veew Vee	Account Funding De Account Object Deta Account Summary Level Summary List 2PLG Monthly Object Sum Object Summary Payroll Synchronizat	select all [dear all] tal all [consolidated] (consolidated) (consolidated)	
Reports And Exports Reports View View View View View View View View	Account Funding De Account Object Deta Account Summary Level Summary List 2PLG Monthly Object Sum Object Summary Payrol Synchronizat Position Funding	select all [dear all] tal all [consolidated] (consolidated) (consolidated)	

IU KFS Budget Construction Reference Guide

Page 1

- Select your point of view.
- Click the view button to select the desired report.
- The Salary Object List Selection page will be displayed.

costeres	bject List Selection			
	Select		Object Code:	Object Description:
)	2000		ACADEMIC SALARY
			Percent Change Threshold:	
				greater than or equal to threshold C less than or equal to threshold
			Include records that are:	 greater than or equal to threshold is less than or equal to threshold

- Select the desired object code and click **submit**.
- The reason code selection screen will be displayed. It allows excluding Reason Codes from the report by checking the select box.

Selected Object code(s)		
	Object Code:	Object Description:
2000		ACADEMIC SALARY
Reason Code Selection		
Select	Appointment Funding R	Reason Code: Appointment Funding Reason Description:

• Click submit and the report will be generated.

					Indiana Universit -14 OPERATING BUE						
organization Se				2013	-14 OPERATING BUD	GET				D-0	qe 1
Inart:	FW	FORT WAYNE								Excluded Reason	
rganization:			CAM	DITC						Excluded Reason	IST PRO
biects:	2000	FORT WAIND	CAPI	105							
bjeccs:	2000								Leaves		
lame			Cla						Reg	Total	
				Position	CSF Base	20	13-14		CSF	Intended	
Cht/Acct/Sacct/	Obtent /	Cohi Doonii	2.0	SPin Grd WM/PM	Salary Pctime			FTE	Code	Amount FTE	
che/Acce/Bacce/	objecc/.	300 j 2030 m	<u>Ac</u>	or in ord my re	ourury reerme	ne outury	recime	1.10	coue	Amt Chq P	lat Cha
RGAST, ANNE S.			PR							And eng P	ee eng
	2000	00007148		AC1 FTX 10/10	75,260 100.		. 00			0 0.00000	
	2000	00007148		2013: 10/10	0 100.		.00			0	0.0
SHTON, PATRICK	TAMPO	00007140	PC	2010.10/10	0 200.					- V	0.0
		00007174		AC1 FTX 10/10	61,895 100.		. 00			0.0.00000	
	2000	00007174		2013: 10/10	61,895 100.		. 00			928	1.5
BARTKY, ELLIOT M		00007174	PT	20131 10/10	01,035 100.					520	
FW 9762164		00013203		AC1 FTX 10/10	61,865 100.		. 00			0.0.00000	
24 2702204	2000	00013203	-	2013: 10/10	0 100.		.00			0 0.00000	0.0
CODISPOTI, MARGI		00015205	LC	2013:10/10	0 100.					- V	0.0
FW 9762701		00013831		AC1 LTY 12/12	54,523 100.		. 00			0 0.00000	
24 5762702	2000	00013831		2013 12/12	54,523 100.		.00			818	1.5
COOPER, MARY DAM	TOTO	00013031	PR	2010112/12	54,525 200.					010	
FW 9762403		00007156		AC1 ETX 10/10	74,195 100.		. 00			0 0.00000	
24 5702405	2000	00007156		2013: 10/10	0 100.		.00			0 0.00000	0.0
RISMORE, AVON G	PDMA TNP		PR	2020.20/20	0 200.					- Č	0.0
FW 9762123				AC1 ETX 10/10	70,794 100.		. 00			0 0.00000	
IN Prontes	2000	00007172		2013: 10/10	0 100.		.00			0 0.00000	0.0
DILTS.DAVID ALL	2.37	00007172	PR	20131 10/10	0 100.					- V	0.0
		00007155		AC1 FTX 10/10	109,987 100.		. 00			0.0.00000	
	2000	00007155		2013: 10/10	0 100.		.00			0	0.0
ARLOW JR.JAMES	0	00007235	PR	2013. 10/10	0 100.						0.0
FW 9762132		00007195		AC1 FTX 10/10	97.239 100.		.00			0 0.00000	
		00007195	-	2013, 10/10	0 100.		.00			0	0.0
ARNSWORTH, RODNI	ev	00007155	PR	2020120/20	0 1001					, i i i i i i i i i i i i i i i i i i i	0.0
		00007183		AC1 FTX 10/10	73,632 100.		.00			0.0.00000	
		00007183		2013: 10/10	0 100.		.00			0	0.0
ISCHER.BERND JU	URGEN		PR							· · · ·	
		00007198		AC1 FTX 12/12	98,774 100.		.00			0 0.00000	
		00007198		2013: 12/12	0 100.		. 00			0	0.0
RANT, JANE A.			PR								0.0
Contraction of the			a. 16							_	
										4 March	
rganization Sal	lary su	nmary - 1/16/	13 1	2142 PM		+ = Total In	ntended 1	Jiscre	pancy	* = Marked Del	eté

IU KFS Budget Construction Reference Guide

• To run a report for a single account while in the Budget Construction Document screen, click the report/dump button.

Construction Document 🔳						FINAL
			Initiator:	kfs	Created:	03:00 PM 01/
					expan	d all collapse
Document Overview						
Document Overview				-		5
Description: Budget Construction	2014 FW 9762701		Explanation	Budget Cor	nstruction	
Organization Document Number: 2014			8	1		
System Information						
System Information						
Fiscal Year:	2013					
Chart/Account: EW	9762701	FW-LIBRARY				
Sub-Account: Sub-Fund Group:	EXTAGY	EXTERNAL AGENCY F	1000			
Sub-rund Group: Org:	EXTAGY	FORT WAYNE CAMPU				
Reports-To Chart/Org: IU	UNIV	UNIVERSITY LEVEL	9%.			
Next Year Data	30362					
Fiscal Year:	2014					
Chart/Org: FW	EW	FORT WAYNE CAMPU	s			
Reports-To Chart/Org: 1	UNIV	UNIVERSITY LEVEL				
Approval Level Data						1
Current Level: 2						
Level Chart/Org: 🔟	UNIV	UNIVERSITY LEVEL	/			
Controls						
1:FW-FW FORT W	AYNE CAMPUS	push down report/dump				
Revenue (0)						
Expenditure (0)						
Expenditure (0)		1				
Expenditure				1	how % adjust	hide detail

• The list of available reports will be return.

eport/Export	• hide
eport/Export	
view	Account Object Detail Report
View	Account Salary Detail Report
view	Account Monthly Detail Report
View	Budgeted Revenue/Expenditure Export
view	Budgeted Salary Lines Export
view	Monthly Budget Export

- Click the <u>view</u> button and the report will be generated.
- Click **close** to return to the account view.
- Click **Close** to return to the Budget Construction Selection screen.