

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.

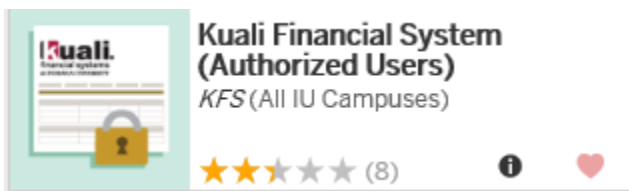
BC contains functionality that allows the user to add, update, and delete funding to/for/from positions. Funding adjustments to a filled position is also known as “setting the salary” for the individual.

Key Information

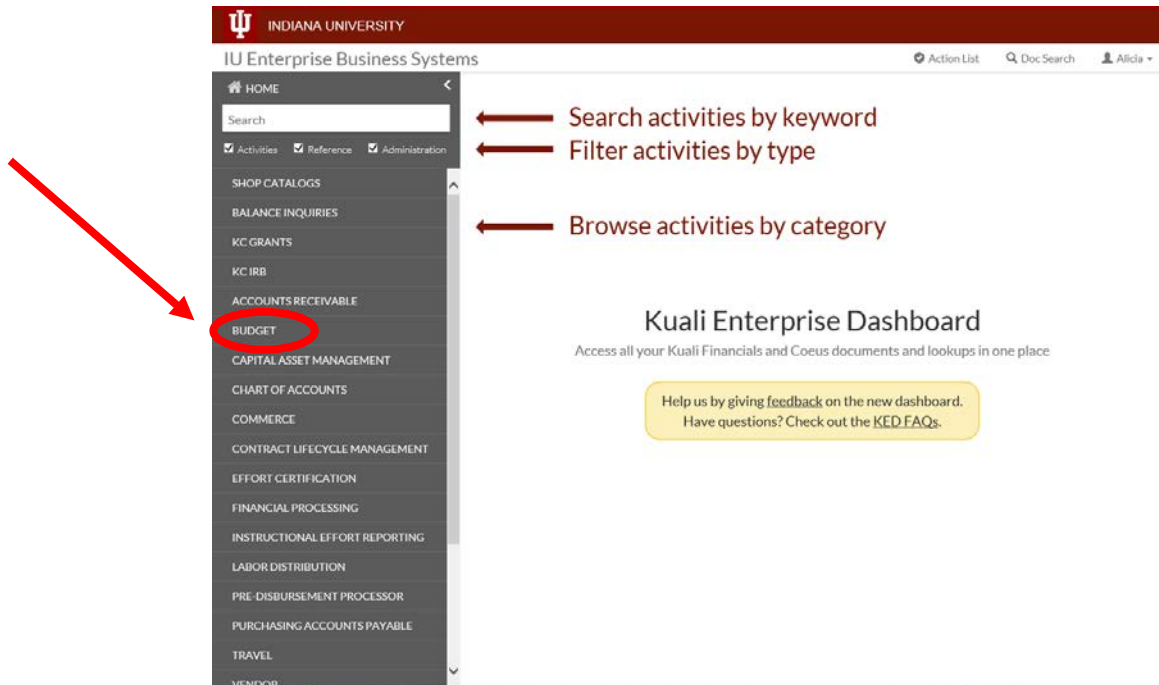
- **Warning! Never close a browser window when waiting for a process to complete (especially when generating reports). Always use the buttons inside the application.**
- Search icons are used to help find desired values.
- The seeding data queries, within the IUIE, provide an accurate data export for 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

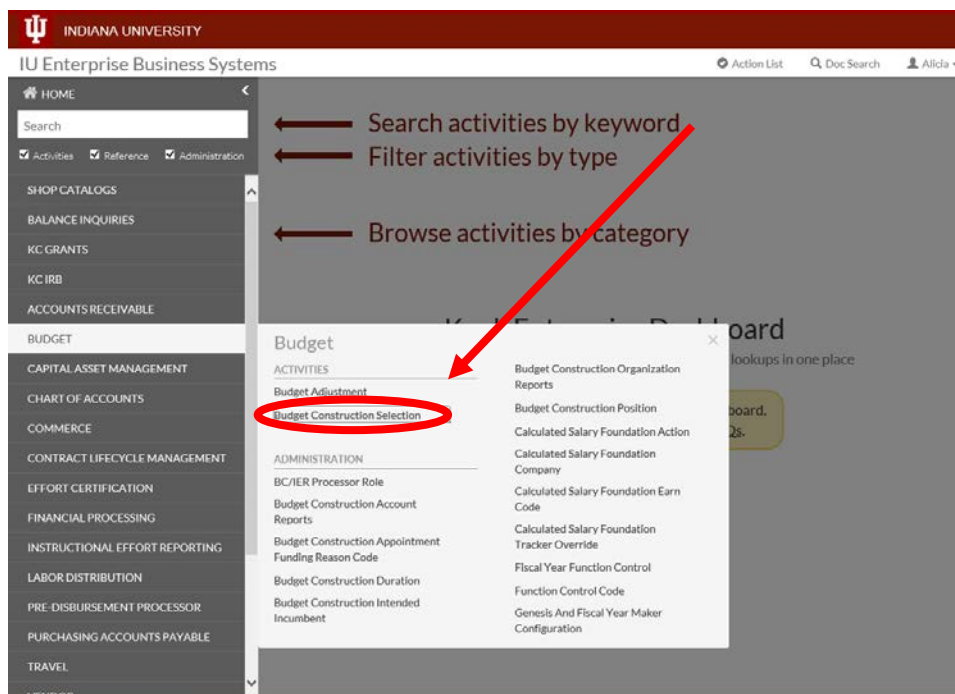
To access the budget construction module click, the “Kuali Financial System (Authorized Users) in One.IU. This tile will take you to the Kuali Enterprise Dashboard (KED).



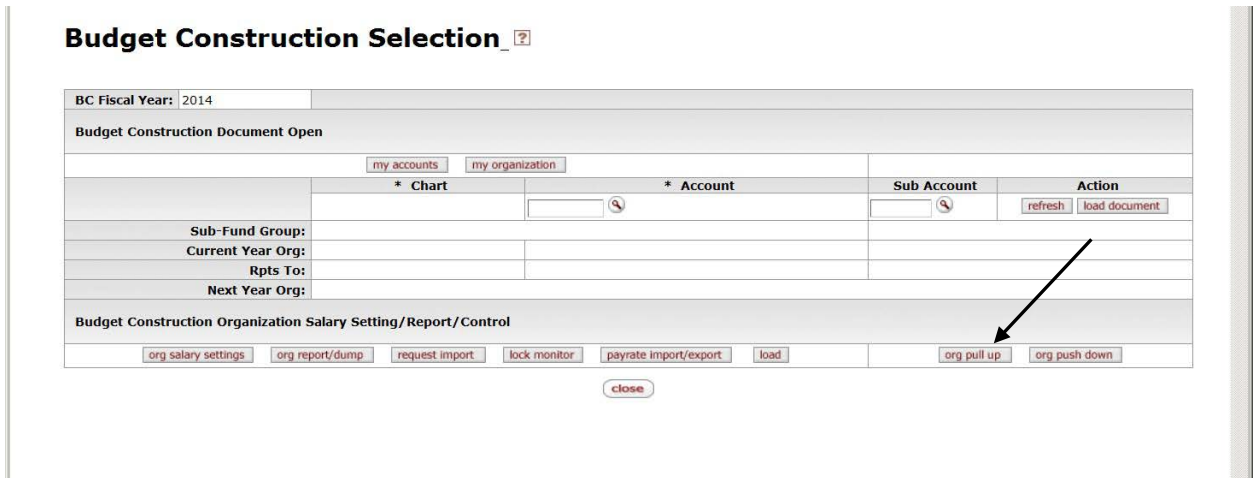
- In the KED, select the “Budget” module from the left navigation pane.



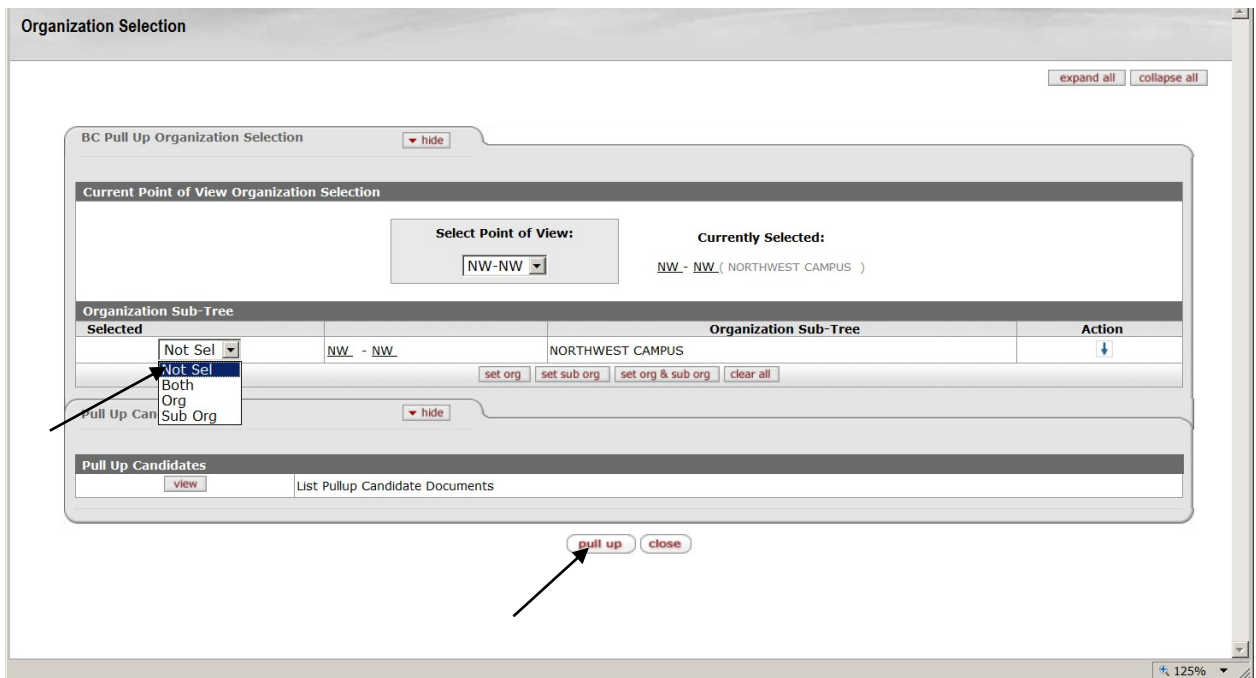
- Within the Budget module, choose the “Budget Construction Selection” link from the list of Budget Activities.



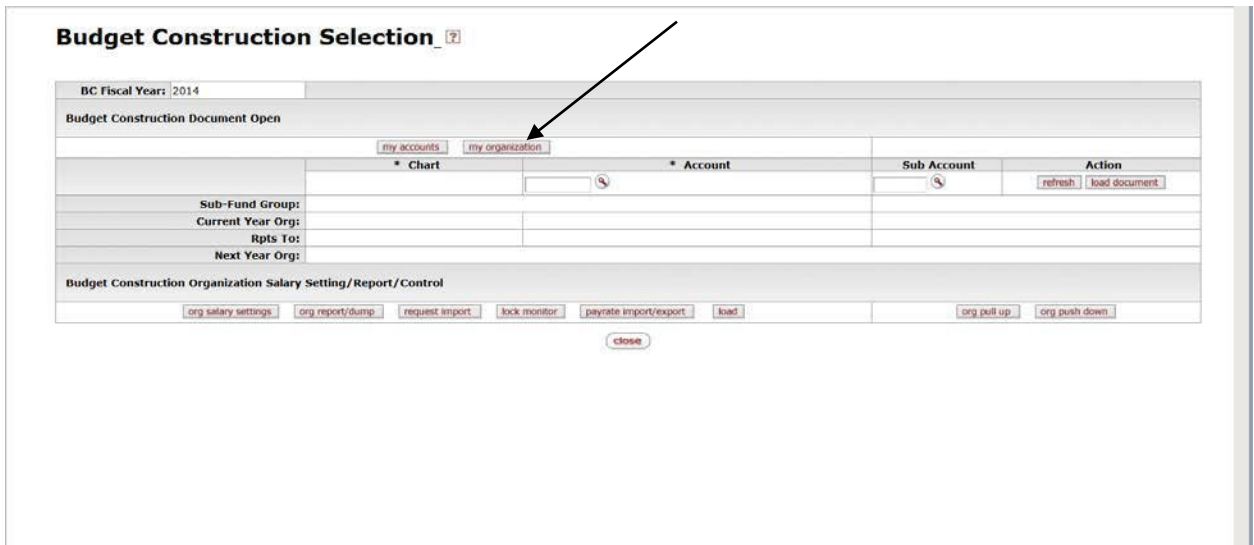
- You need to pull documents up to your approval level to gain edit access.



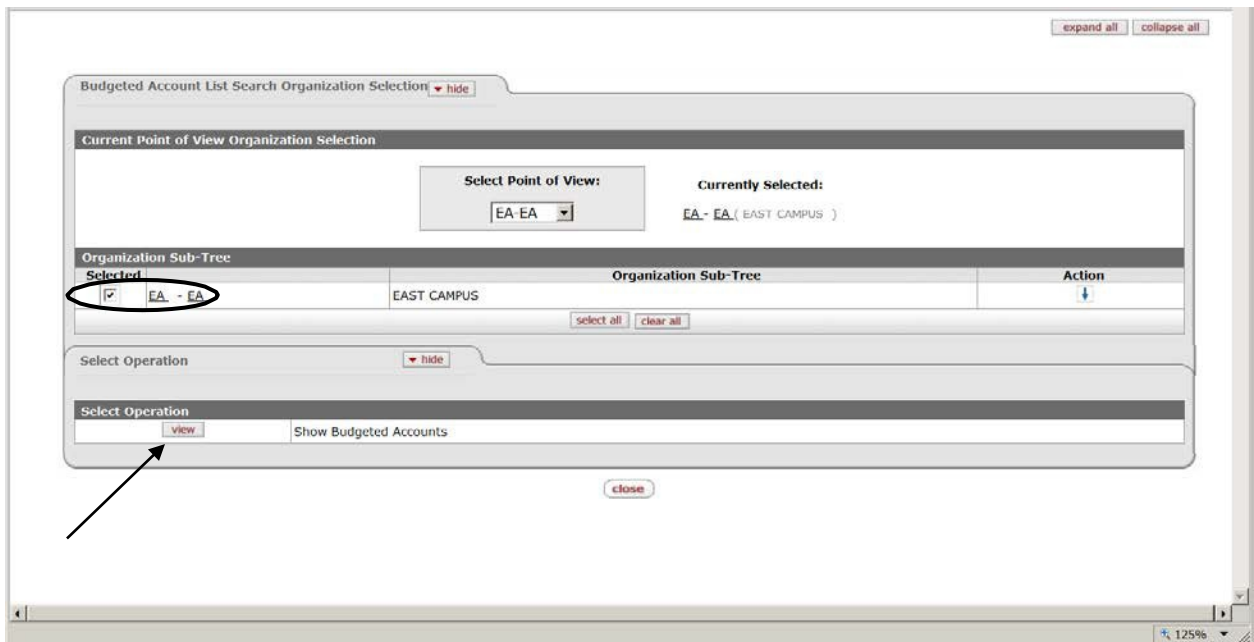
- To pull up to the Org Level click the **org pull up** button.
- The Organization Selection screen is displayed, select Both and click **pull up**.



- 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 by clicking on the **my organization** button.



- 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



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

Budget Construction Document Doc Nbr: 13653889; Status: FINAL
Initiator: kfs; Created: 01:35 PM 01/01/2013

Edit access granted.

Document Overview

Document Overview	
* Description:	Budget Construction 2014 EA 4769532
Organization Document Number:	2014
Explanation:	Budget Construction

System Information

System Information		
Fiscal Year:	2013	
Chart/Account:	EA 4769532	TITLE III ADMINISTRATION '13
Sub-Account:	ADMIN	ADMINISTRATION
Sub-Fund Group:	STATEK	STATE OF INDIANA
Org:	AAOA	AREA IX IN HOME AN
Reports-To Chart/Org:	EA EXEC	EXECUTIVE MANAGEMENT

Next Year Data

Next Year Data		
Fiscal Year:	2014	
Chart/Org:	EA AAOA	AREA IX IN HOME AN
Reports-To Chart/Org:	EA EXEC	EXECUTIVE MANAGEMENT

Approval Level Data

Approval Level Data		
Current Level:	4	
Level Chart/Org:	EA EA	EAST CAMPUS

Controls

5:IU-UNIV UNIVERSITY LEVEL | pull up | 3:EA-CADM CAMPUS ADMINISTRATION | push down | report/dump

Revenue (0) | show

Expenditure (19,400) | show

Notes and Attachments (0) | show

Route 1 on | show

- Work through the list by clicking on the Load Document link.
- 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.

Budget Construction Selection

BC Fiscal Year: 2014

Budget Construction Document Open

my accounts		my organisation	
* Chart	* Account	Sub Account	Action
EA EAST	4769532	ADMIN	refresh load document
Sub-Fund Group:			
Current Year Org:			
Rpts To:			
Next Year Org:			

Budget Construction Organization Salary Setting/Report/Control

org salary settings | org report/dump | request import | lock monitor | payroll 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 Edit Access.
- You can also choose to budget by position number or incumbent from the Budget Construction Selection screen.
- Click on the **org salary settings** button.

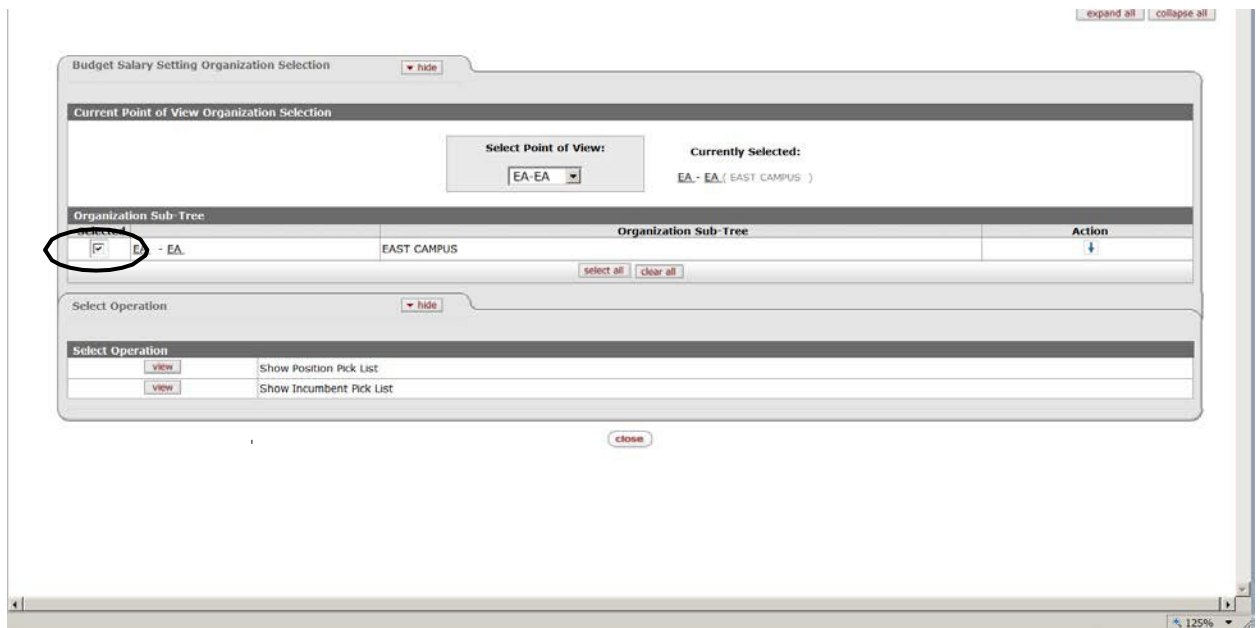
Budget Construction Selection



* Chart	* Account	Sub Account	Action
			<input type="button" value="refresh"/> <input type="button" value="load document"/>

Sub-Fund Group:
Current Year Org:
Rpts To:
Next Year Org:

- Click the Selected box beside the Chart and Org.
- Click the 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.



expand all | collapse all

Budget Salary Setting Organization Selection

Current Point of View Organization Selection

Select Point of View: EA-EA Currently Selected: EA - EA (EAST CAMPUS)

Organization Sub-Tree

Organization Sub-Tree	Action
EA - EA EAST CAMPUS	<input type="button" value="view"/>

Select Operation

Select Operation

<input type="button" value="view"/>	Show Position Pick List
<input type="button" value="view"/>	Show Incumbent Pick List

125%

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

Budget Construction Position Select Lookup

Position Number:

Position Type:

Position Description:

Dept.ID Chart:

Dept.ID Org:

Salary SetId:

Plan:

Grade:

Person Name:

332 items found. Please refine your search criteria to narrow down your search.

Actions	Position Number	Position Type	Position Description	Department ID	Salary SetId	Plan	Grade	Person Name
Posn_Salset	00000540	AC	FACULTY/INSTRUCTOR	EA-SCI	IUEAA	AC1	FTX	NOT FUNDED
Posn_Salset	00003366	SB	SR EXEC SEC II	EA-CHAN	IUEAA	CL	10	DILWORTH,RENA VAN VOORHIS
Posn_Salset	00003491	AC	FACULTY/INSTRUCTOR	EA-BUS	IUEAA	AC1	FTX	NOT FUNDED
Posn_Salset	00003618	SM	DIRECTOR ALUM/CEREMONIES	EA-EXAF	IUEAA	PAE	3PR	WIESEHAN,TERRY JO HAWKINS
Posn_Salset	00003619	SM	DIR. OF CAMPUS LIFE	EA-SACT	IUEAA	PAE	3SA	HESTER,REBECAH LYNNE
Posn_Salset	00003663	SB	EXECUTIVE SECRETARY	EA-ACAD	IUEAA	CL	08	LADD,KIM
Posn_Salset	00003883	SM	CASE MGR/LTC COORD	EA-AA0A	IUEAA	PAE	2PB	NOT FUNDED
Posn_Salset	00003941	SB	ADM. SECRETARY	EA-SCI	IUEAA	CL	07	FOSTER,MARY JO
Posn_Salset	00004517	AC	CHANCELOB	EA-CHAN	IUEAA	AC1	AAE	RICHARDS,LAURENCE D
Posn_Salset	00004623	AC	DIRECTOR, LIBRARY	EA-LIBR	IUEAA	AC1	LTX	YATES,FRANCES RUTH
Posn_Salset	00005705	AC	LECTURER	EA-HSS	IUEAA	AC1	FLX	PRATER,AIMEE RENEE
Posn_Salset	00005706	AC	FACULTY/INSTRUCTOR	EA-HSS	IUEAA	AC1	FTX	BULLOCK,DEMISE MURIEL
Posn_Salset	00005710	AC	FACULTY/INSTRUCTOR	EA-HSS	IUEAA	AC1	FTX	KRIESE,PAUL
Posn_Salset	00005711	AC	LECTURER	EA-HSS	IUEAA	AC1	FLX	TOLLEY,ARTHUR ROBERT
Posn_Salset	00005712	AC	FACULTY/INSTRUCTOR	EA-HSS	IUEAA	AC1	FTX	WHITEHEAD,STEPHANIE NICHOL

- 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 **show** button on the Revenue tab.

System Information

Fiscal Year: 2013
 Chart/Account: FW 9762174 FW-SOCIOLOGY
 Sub-Account: -----
 Sub-Fund Group: EXTAGY EXTERNAL AGENCY FUNDS
 Org: FW FORT WAYNE CAMPUS
 Reports-To Chart/Org: IU UNIV UNIVERSITY LEVEL

Next Year Data

Fiscal Year: 2014
 Chart/Org: FW FW FORT WAYNE CAMPUS
 Reports-To Chart/Org: IU UNIV UNIVERSITY LEVEL

Approval Level Data

Current Level: 0 Account Level Update Access
 Level Chart/Org:

Controls

2:IU-UNIV UNIVERSITY LEVEL

Revenue (0)

Revenue	Object	SubObject	Base Budget	Requested	% Change	Action
Add: <input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text" value="0"/>		<input type="button" value="add"/>
1800	OTRA, ETC	---	355,035	<input type="text" value="0"/>	-100.00	<input type="button" value="create month"/> <input type="button" value="bal inquiry"/>
Revenue Totals			355,035	0	(100.00)	

Global Revenue Actions

Adjust By Percent:

Expenditure (368,222)

Notes and Attachments (0)

Route Log

- Once you have completed setting the Revenue click **save** and **close** 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.

Expenditure (151,276) hide

Expenditure		show % adjust		hide detail		
Add:	* Object	SubObject	* Base Budget	* Requested	% Change	Action
	2400	PROF SAL	74,000	74,000	0.00	create month bal inquiry show benefits salary setting
	2500	IND EX STAFF	63,169	63,169	0.00	create month bal inquiry show benefits salary setting
	4028	CONF/WRKSHPS	1,500	1,500	0.00	create month bal inquiry
	4085	TEL MNTH RENT	1,320	1,320	0.00	create month bal inquiry
	4086	TEL LONG DIS	75	75	0.00	create month bal inquiry
	4100	OFF SUPPLIES	582	582	0.00	create month bal inquiry
	4166	PRINT/CLIP	736	736	0.00	create month bal inquiry
	4300	POSTAGE	200	200	0.00	create month bal inquiry
	4777	MAIN NONTRCT	665	665	0.00	create month bal inquiry
	4871	BACKGRD CK	7,500	7,500	0.00	create month bal inquiry
	5050	INDUSE FEE	140	140	0.00	create month bal inquiry
	5625	FRNG BEN CST	27,996	0	-100.00	bal inquiry
	5760	FICA	9,602	0	-100.00	bal inquiry
	5772	RETIRE EXMPT	11,788	0	-100.00	bal inquiry
	5773	RETIRE NONMPT	7,991	0	-100.00	bal inquiry
	6000	INDY TRVL	1,000	1,000	0.00	create month bal inquiry
	7900	UNIV SAL	-611	-611	0.00	create month bal inquiry
	9927	HMS	1,000	1,000	0.00	create month bal inquiry
		DUO ALLOT EX				
Expenditure Totals			208,653	151,276	(27.50)	

Global Expenditure Actions

Adjust By Percent:

Salary Setting

- For quick salary setting click the salary setting link.

Sub-Fund Group: EXTAGY | EXTERNAL AGENCY FUNDS
 Org: FW | FORT WAYNE CAMPUS
 Reports-To Chart/Org: IU | UNIV | UNIVERSITY LEVEL

Next Year Data
 Fiscal Year: 2014
 Chart/Org: FW | FORT WAYNE CAMPUS
 Reports-To Chart/Org: IU | UNIV | UNIVERSITY LEVEL

Approval Level Data
 Current Level: 0 | Account Level Update Access
 Level Chart/Org:

Controls
 2:IU-UNIV UNIVERSITY LEVEL | pull up | report/dump

Revenue (0) show

Expenditure (0) hide

Expenditure		show % adjust		hide detail		
Add:	* Object	SubObject	* Base Budget	* Requested	% Change	Action
	2000	ACAD SALARY	247,687	0	-100.00	create month bal inquiry show benefits salary setting
	5625	FRNG BEN CST	50,553	0	-100.00	bal inquiry
	5760	FICA	17,338	0	-100.00	bal inquiry
	5772	RETIRE EXMPT	39,457	0	-100.00	bal inquiry
Expenditure Totals			355,035	0	(100.00)	

Global Expenditure Actions

Adjust By Percent:

Notes and Attachments (0) show

Route Log show

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

Quick Salary Setting

expand all collapse all

Quick Salary Setting hide

Expenditure Salary Line							
Chart	Account	SubAccount	Object	SubObject	SubFundGrpCd	Org	
FW PORT WAYNE	9762701 FW-LIBRARY	*****	2000 ACADEMIC SALARY	---	EXTERNAL AGENCY FUNDS	FORT WAYNE CAMPUS	
				add position	add incumbent		

Salary Line Detail														
Del	Position	Name	Cls	Salary Plan	Salary Grade	Work Months	Pay Months	CSF Amt	CSF FTE	Funding Month	Requested Salary	Requested FTE	Change Percent	Actions
<input type="checkbox"/>	00013831	CODISPOTT,MARGIT E.	LC	AC1	LTX	12	12		1.00000	12	0	1.00000	(100.00)	posn salset incmbnt salset vacate delete
<input type="checkbox"/>	00014117	SKEKLOFF,SUSAN DIANE	LC	AC1	LTX	12	12		1.00000	12	0	1.00000	(100.00)	posn salset incmbnt salset vacate delete
<input type="checkbox"/>	00014316	TRUESDELL,CHERYL B.	LI	AC1	AAI	12	12		1.00000	12	0	1.00000	(100.00)	posn salset incmbnt salset vacate delete
Total:									3.00000		0	3.00000	(100.00)	
Expenditure Line Base:									Req:		0		(100.00)	

Global Actions

Adjust: % 1.5 apply Refresh Position? Refresh Incumbent?

save close

- 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.

Quick Salary Setting

expand all collapse all

Quick Salary Setting hide

Expenditure Salary Line							
Chart	Account	SubAccount	Object	SubObject	SubFundGrpCd	Org	
FW PORT WAYNE	9762701 FW-LIBRARY	*****	2000 ACADEMIC SALARY	---	EXTERNAL AGENCY FUNDS	FORT WAYNE CAMPUS	
				add position	add incumbent		

Salary Line Detail														
Del	Position	Name	Cls	Salary Plan	Salary Grade	Work Months	Pay Months	CSF Amt	CSF FTE	Funding Month	Requested Salary	Requested FTE	Change Percent	Actions
<input type="checkbox"/>	00013831	CODISPOTT,MARGIT E.	LC	AC1	LTX	12	12		1.00000	12	0	1.00000	(100.00)	posn salset incmbnt salset vacate delete
									Adjust: %		apply			
<input type="checkbox"/>	00014117	SKEKLOFF,SUSAN DIANE	LC	AC1	LTX	12	12		1.00000	12	0	1.00000	(100.00)	posn salset incmbnt salset vacate delete
									Adjust: %		apply			
<input type="checkbox"/>	00014316	TRUESDELL,CHERYL B.	LI	AC1	AAI	12	12		1.00000	12	0	1.00000	(100.00)	posn salset incmbnt salset vacate delete
									Adjust: %		apply			
Total:									3.00000		0	3.00000	(100.00)	
Expenditure Line Base:									Req:		0		(100.00)	

Global Actions

Adjust: % apply Refresh Position? Refresh Incumbent?

save close

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

Salary Setting by Incumbent

Incumbent: **hide**

Incumbent Information:
 * Emplid: 0000607963 Name: NUSBAUMER, M R CIs: PR
 Sal Setid: IJFWA Plan: AC1 Sal Grader: EIX

Incumbent Funding: **hide**

add Add Funding

Del	* Chart	* Account	Sub Account	* Object	Sub Object	Position	Work Months	Pay Months	FTE	Post																																																																														
<table border="1"> <thead> <tr> <th>Request:</th> <th>Row Operation</th> <th>Amount</th> <th>Hourly Rate</th> <th>Months</th> <th>Percent Time</th> <th>FTE</th> <th>Reason Select</th> <th>Reason Amount</th> </tr> </thead> <tbody> <tr> <td>Leave Request CSF:</td> <td>NONE</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Total Intended:</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>											Request:	Row Operation	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount	Leave Request CSF:	NONE								Total Intended:																																																											
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- To add the new request amount enter it on the request line.
- 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.

Incumbent Funding: **hide**

Del	* Chart	* Account	Sub Account	* Object	Sub Object	Position	Work Months	Pay Months	FTE	Post																																																																					
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Purged Appointment Funding **show**

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

Quick Salary Setting

Salary setting was successfully saved.

Quick Salary Setting

Expenditure Salary Line

Chart	Account	SubAccount	Object	SubObject	SubFundGrpCd	Org
FW FORT WAYNE	9762174 FW-SOCIOLOGY	-----	2000 ACADEMIC SALARY	---	EXTERNAL AGENCY FUNDS	FORT WAYNE CAMPUS

add position add incumbent

Salary Line Detail

Del	Position	Name	Cls	Salary Plan	Salary Grade	Work Months	Pay Months	CSF Amt	CSF FTE	Funding Month	Requested Salary	Requested FTE	Change Percent	Actions
<input type="checkbox"/>	00007158	NUSBAUMER, M R	PR	ACL	FTX	10	10		1.00000	10		1.00000	1.50	posn salset incmbnt salset vacate delete
<input type="checkbox"/>	00007174	ASHTON, PATRICK JAMES	PC	ACL	FTX	10	10		1.00000	10		1.00000	1.50	posn salset incmbnt salset vacate delete
<input type="checkbox"/>	00013595	IADICOLA, PETER	PR	ACL	FTX	12	12		1.00000	12		1.00000	1.50	posn salset incmbnt salset vacate delete
Total:									3.00000			3.00000	1.50	
Expenditure Line Base:										Req:			3.71	

Global Actions

Adjust: % apply Refresh Position? Refresh Incumbent?

save close

- 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.

Budget Construction Position Lookup

University Fiscal Year: 2014

Position Number: 00016995

Position Type:

Department Set Id:

Dept.ID Chart:

Dept.ID Org:

Responsibility Center Code:

Position Description:

Salary Set Id:

Position Salary Plan Default:

Position Salary Grade Default:

Position Union Codes:

search clear cancel get new

Action	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	Position Effective Status
Posn Salset Posn Salset w/sync	2014	00016995	SM	TUBLA	BL-BAP	74	ASSISTANT VICE PRESIDENT	R	TUBLA	PAE	XX		No	A

One item found. 1
Export options: CSV | Excel | XML

- 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.

* Year: 2014		Position: 00016995	Position Desc: ASSISTANT VICE PRESIDENT	
Default Object Code: 2400	Department Identifier: BL-BAP		Job Code Set Id: IUBLA	
Job Code: 001874	Salary Plan: PAE		Salary Grade: XX	
Work Months: 12	Pay Months: 12		Standard Hours: 40.00	
FTE: 1.00	Pos Eff Date: 03/20/2012			

Del	Chart	Account	Sub Account	Object	Sub Object	Emplid	Cls	Post
UA	UNIV ADMIN	1912201 UNIVERSITY BUDGET OFFICE		2400 PROF SAL				

Row Operation	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount
Request:							
Leave Request CSF: NONE							
Total Intended:							

Del	Chart	Account	Sub Account	Object	Sub Object	Emplid	Cls	Post
BL	BLOOMINGTON	1020200 BUDGETARY AFFAIRS	----	2400 EXMPT STAFF	---	0001785912 GERSTMAN,R02ALL		

Row Operation	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount
CSF: Adjust: %	77,875			50.00	0.50000		
Request:	0	0	12	50.00	0.50000		0
Leave Request CSF: NONE	0			0.00	0.00000		
Total Intended:	0				0.00000		

- 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.

Budget Construction Position Lookup

University Fiscal Year:	2014
Position Number:	00038285
Position Type:	
Department Set Id:	
Dept.ID Chart:	
Dept.ID Org:	
Responsibility Center Code:	
Position Description:	
Salary Set Id:	
Position Salary Plan Default:	
Position Salary Grade Default:	
Position Union Code:	

search clear 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	Position Effective Status
Posn Salary W/Expns	2014	00038285	SM	IUBLA	UA-BUDU	92	FINANCIAL MGR	R	IUBLA	PAE	4AD		No	A

One item found.1
Export options: CSV | Excel | XML

- The position will be returned to the account you are working with to allow salary setting.
- Once salaries are set for the account click **save** 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.

Org: FW FORT WAYNE CAMPUS
 Reports-To Chart/Org: IU UNIV UNIVERSITY LEVEL

Next Year Data
 Fiscal Year: 2014
 Chart/Org: FW FORT WAYNE CAMPUS
 Reports-To Chart/Org: IU UNIV UNIVERSITY LEVEL

Approval Level Data
 Current Level: 0 Account Level Update Access
 Level Chart/Org: UNIV UNIVERSITY LEVEL

Controls
 2:IU-UNIV UNIVERSITY LEVEL | pull up | report/dump

Revenue (0) show

Expenditure (0) hide

Add:	* Object	SubObject	* Base Budget	* Requested	% Change	Action
	2000		247,687	256,887	3.71	create month bal inquiry show benefits salary setting
	2PLG		0	-368,222		bal inquiry delete
	5625	FUND BEN CST	50,553	52,431	3.71	bal inquiry
	5760	FICA	17,338	17,982	3.71	bal inquiry
	5772	RETIRE EXMPT	39,457	40,922	3.71	bal inquiry
Expenditure Totals			355,035	0	(100.00)	

Global Expenditure Actions
 Adjust By Percent: apply | refresh | month spread | month delete | calculate benefits

Notes and Attachments (0) show

Route Log show

save close

- 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.

Budget Construction Selection ?

BC Fiscal Year: 2014

Budget Construction Document Open

my accounts | my organization

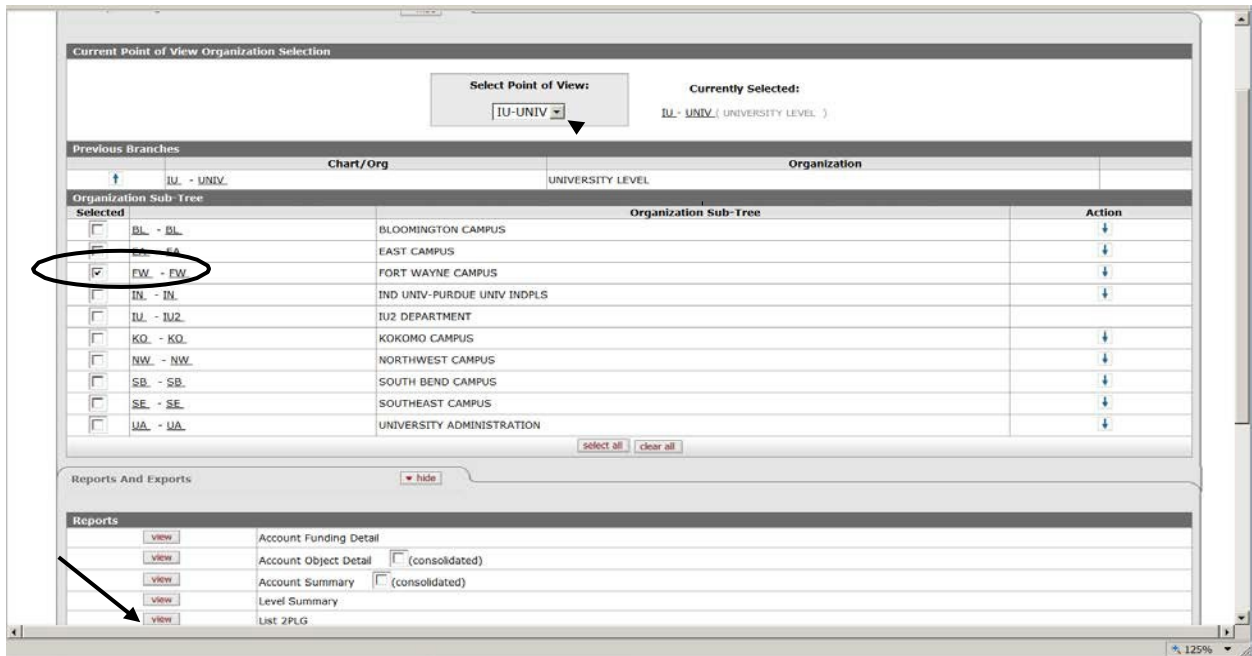
Chart	Account	Sub Account	Action
UA UNIV ADMIN	1912201 UNIVERSITY BUDGET OFFICE		refresh load document
Sub-Fund Group: GENFND		GENERAL FUNDS	
Current Year Org:	BUDU	UNIVERSITY BUDGET OFFICE	
Rpts To: UA	CTRL	CTRL	
Next Year Org: UA	BUDU	UNIVERSITY BUDGET OFFICE	
Rpts To: UA	CTRL	OFFICE OF THE CONTROLLER	

Budget Construction Organization 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

- Select your point of view.



- 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.

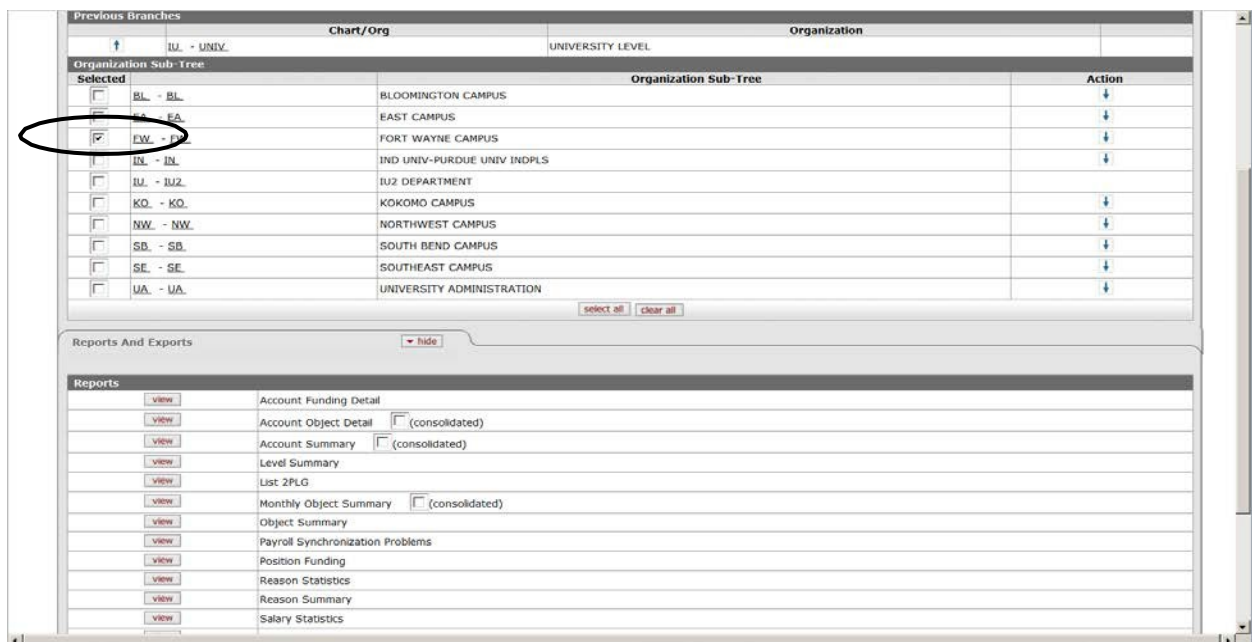
Indiana University
2013-14 OPERATING BUDGET

Page 1

Organization Selection		
Chart:	FW	FORT WAYNE
Organization:	FW	FORT WAYNE CAMPUS
Chart:		FW FORT WAYNE

Account / Sub:		Account/Sub Name	2013-14
			Req. Amount
9762204	-----	MANAGEMENT & MARKETING	-343,007
9762701	-----	FW-LIBRARY	-317,414

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



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

Salary Object List Selection

Salary Object List Selection

Select	Object Code:	Object Description:
<input checked="" type="checkbox"/>	2000	ACADEMIC SALARY

Percent Change Threshold

Setting a percent change threshold runs the report for records based on the threshold settings below.

Use Threshold Settings:

Percent Change Threshold:

Include records that are: greater than or equal to threshold 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.

Reason Code Selection

Informational messages in this Section:
 Optional: Pick Reason Codes to exclude from report.

Selected Object Code(s)

Object Code:	Object Description:
2000	ACADEMIC SALARY

Reason Code Selection

Select	Appointment Funding Reason Code:	Appointment Funding Reason Description:
<input checked="" type="checkbox"/>	PRO	Promotion - Academic Only

- Click submit and the report will be generated.

Indiana University
2013-14 OPERATING BUDGET

Organization Selection
 Chart: FW FORT WAYNE
 Organization: FW FORT WAYNE CAMPUS
 Objects: 2000

Page 1
Excluded Reasons: PRO

Name	Cis	Position	CSF Base		2013-14			Leaves		Total	
			Salary	Pct time	Salary	Pct time	FTE	Code	Amount	FTE	
Chrt/Acct/Sacct/Object/Sobj	Posn#	AP SP1n Grd NM/PM									
ARGAST, ANNE S.	PR	FT1 AC1 FTX 10/10	75,260	100.00					0	0.00000	
FW 9762132	----	00007148		0	100.00				0	0.0%	
ASHTON, PATRICK JAMES	PC	AA AC1 FTX 10/10	61,895	100.00					0	0.00000	
FW 9762174	----	00007174		0	100.00				928	1.5%	
BARTKY, ELLIOT M	PT	FT3 AC1 FTX 10/10	61,865	100.00					0	0.00000	
FW 9762164	----	00013203		0	100.00				0	0.0%	
CODISPOTI, MARGIT E.	LC	LTX 12/12	54,523	100.00					0	0.00000	
FW 9762701	----	00013831		0	100.00				818	1.5%	
COOPER, MARY DANUSIS	PR	AAJ AC1 FTX 10/10	74,195	100.00					0	0.00000	
FW 9762403	----	00007156		0	100.00				0	0.0%	
CRISMORE, AVON GERMAINE	PR	FT1 AC1 FTX 10/10	70,794	100.00					0	0.00000	
FW 9762123	----	00007172		0	100.00				0	0.0%	
DILTS, DAVID ALLAN	PR	FT1 AC1 FTX 10/10	109,987	100.00					0	0.00000	
FW 9762203	----	00007155		0	100.00				0	0.0%	
FARLOW JR, JAMES O.	PR	FT1 AC1 FTX 10/10	97,239	100.00					0	0.00000	
FW 9762132	----	00007195		0	100.00				0	0.0%	
FARNSWORTH, RODNEY	PR	FT1 AC1 FTX 10/10	73,632	100.00					0	0.00000	
FW 9762123	----	00007183		0	100.00				0	0.0%	
FISCHER, BERND JURGEN	PR	FT1 AC1 FTX 12/12	98,774	100.00					0	0.00000	
FW 9762136	----	00007198		0	100.00				0	0.0%	
GRANT, JANE A.	PR										

Organization Salary Summary - 1/16/13 12:42 PM

+ = Total Intended Discrepancy * = Marked Delete

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

Budget Construction Document

Doc. Num: 13793/04 Status: PENDING
 Initiator: kfs Created: 03:00 PM 01/21/2013

Document Overview

* Description: Budget Construction 2014 FW 9762701 Explanation: Budget Construction
 Organization Document Number: 2014

System Information

Fiscal Year:	2013	
Chart/Account:	FW 9762701	FW-LIBRARY
Sub-Account:	*****	
Sub-Fund Group:	EXTAGY	EXTERNAL AGENCY FUNDS
Org:	FW	FORT WAYNE CAMPUS
Reports-To Chart/Org:	IU UNIV	UNIVERSITY LEVEL

Next Year Data

Fiscal Year:	2014	
Chart/Org:	FW FW	FORT WAYNE CAMPUS
Reports-To Chart/Org:	IU UNIV	UNIVERSITY LEVEL

Approval Level Data

Current Level:	2	
Level Chart/Org:	IU UNIV	UNIVERSITY LEVEL

Controls

1:FW-FW FORT WAYNE CAMPUS push down **report/dump**

Revenue (0) show

Expenditure (0) hide

* Object	SubObject	* Base Budget	* Requested	% Change	Action
----------	-----------	---------------	-------------	----------	--------

- The list of available reports will be return.

Document Reports and Exports

Report/Export

Report/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

close

- Click the **view** 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.