

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	janization		
	* Chart	* Account	Sub Account	Action
		(9	refresh load document
Sub-Fund Gr	oup:			
Current Year	Org:			
Rpts	5 To:			
Next Year	Org:			
Budget Construction Organiza	tion Salary Setting/Report/Contro			
org salary settings	org report/dump request import	lock monitor payrate import/export lo	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 (NORTHWEST CAMPUS)	
Organization Cub Terr		
Selected	Organization Sub-Tree	Action
Not Sel 💌	NW - NW NORTHWEST CAMPUS	ŧ
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 (close)	
	(<u>pull up</u>) (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 <u>my organization</u> button.

BC Fiscal Year: 2014				
Budget Construction Document Open				
	my accounts my	rorganization		
	* Chart	* Account	Sub Account	Action
		S	8	refresh load document
Sub-Fund Grou	pt			
Current Year Or	;			
Rpts T	ə:			
city sanary sourcings	ord refrest on the	Recention payment inporcesport Rate	Lord bon o	p org posit 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		
	(m)		

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

					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	Electric Manage		2012				
	Chart/Account:	FA	4769533	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:	6	2014				
	Chart/Org:	EA	AAQA	AREA IX IN HOME AN			
	Reports-To Chart/Org:	EA	EXEC	EXECUTIVE MANAGEMENT			
Approval Level Data							
	Current Level:	4	2	FLOT CHING			
and the second se	Level Chart/Org:	LA	LA	EAST CAMPUS			_
Comrois		Course and					_
5:	IO-ONIV UNIVERSITY LEVEL	pus up	3:EA-CADM CAMPUS		report/domp		
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 FISCAI TEAT: 2014								
Budget Construction Document Open								
		y accounts my	organization			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
	* ch	art		* Account	t	Sub Account		Action
	EA EAST	4	769532 3	ton '13		ADMIN SATION		refresh load document
Sub-Fund Group:								
Current Year Org:		-						
Rpts To:						· · · · ·		
Next Year Org:								
Budget Construction Organization Sala	ary Setting/Repor	t/Control						
org salary settings	org report/dump	request import	lock monitor	payrate import/export	load	lorg	pullup	org push down
				(interne)				
				ciose				

- 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.

and the second terms of the second							
udget Construction Document Open							
	my accounts my	organization					
	* Chart		* Acc	ount	Sub Account	1	Action
		1	9		9	refr	esh load document
Sub-Fund Group:							
Current Year Org:							
Rpts To:							
Next Year Org:							
udget 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
X			Name and American				
			close				
			close				
			Canada				

- 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.

	Select E	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		
		(close)	

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

		Pos	sition Number:						
		1	Position Type:	9					
		Positio	n Description:						
		-	Dept.ID Chart:					1	
				- 0	<u> </u>			/	
			Dept.ID Org:				/		
			Salary SetId:			/			
			Plan:	9					
			Grades	9					
		1				/			
			Person Name: Bean	search clear	cancel extended	(
132 items fou	nd. Please refine your sear	ch criteria to narrow d	Down your search.	search clear	(cancel (extended)				
332 items fou Actions	nd. Please refine your sear	ch criteria to narrow d Position Type	own your search.	ition Description	cancel extended Department ID	Salary SetId	Plan	Grade	Person Name
332 items fou Actions Posn Salset	nd. Please refine your sean Position Number 00000540	ch criteria to narrow d Position Type AC	Sown your search.	ition Description	Cancel extended	Salary SetId IUEAA	Plan AC1	Grade ETX	Person Name
332 items four Actions Posn Salset Posn Salset	nd. Please refine your sean Position Number 00000540 00003366	ch criteria to narrow d Position Type AC SB	Iown your search. Posi FACULTY/INSTRUCT SR EXEC SEC II	ition Description	Cancel extended Department ID EA-SCI EA-CHAN	Salary SetId IUEAA IUEAA	Plan AC1 CL	Grade FIX 10	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS
332 items four Actions Posn Salset Posn Salset Posn Salset	nd. Please refine your seam Position Number 00000540 00003366 00003491	ch criteria to narrow d Position Type AC SB AC	Sown your search. Posi FACULTY/INSTRUCT SR EXEC SEC II FACULTY/INSTRUCT	tion Description	Department ID EA-SCI EA-CHAN EA-BUS	Salary SetId IUEAA IUEAA IUEAA	Plan AC1 CL AC1	Grade EIX 10 EIX	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED
332 items four Actions Posn Salset Posn Salset Posn Salset Posn Salset	nd. Please refine your sean Position Number 00000540 00003366 00003491 00003618	ch criteria to narrow d Position Type AC SB AC SM	own your search. Posi PACULTY/INSTRUCT SR EXEC SEC II PACULTY/INSTRUCT DIRECTOR ALUM/CE	ition Description	Department ID EA-SCI EA-CHAN EA-ENIS EA-EXAF	Salary SetId JUEAA JUEAA JUEAA JUEAA	Plan ACL CL ACL PAE	Grade FTX 10 FIX 3PB	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED WIESENAN, TERRY JO HAWKINS
332 items fou Actions Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset	nd. Please refine your sear Position Number 00000340 00003366 00003491 00003619	ch criteria to narrow d Position Type AC SB AC SM SM SM	Jown your search. PACULTY/INSTRUCT SR EXEC SEC II FACULTY/INSTRUCT DIRECTOR ALUM/CE DIR. OF CAMPUS LIP	Rion Description COB EREMONIES FE	Department ID EA-SCI EA-CHAN EA-BUS EA-EXAE EA-SACI	Salary SetId IUEAA IUEAA IUEAA IUEAA IUEAA	Plan AC1 CL AC1 PAE PAE	Grade FIX 10 FIX 3PR 3SA	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED WIESEHAN, TERRY JO HAWKINS HESTER, REBECKAH LYNNE
332 items fou Actions Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset	nd. Please refine your seam Position Number 0000340 00003451 00003619 00003619 0000363	ch criteria to narrow d Position Type AC SB AC SM SM SB SB	Iown your search. Possion Possion PACULTY/INSTRUCT SR EXEC SEC II PACULTY/INSTRUCT DIR.OF CAMPUS LIP DIR. OF CAMPUS LIP EXECUTIVE SECRET	tion Description	Cancel extended	Salary SetId IUEAA IUEAA IUEAA IUEAA IUEAA IUEAA	Plan AC1 CL AC1 PAE PAE CL	Grade EIX 10 EIX 3PR 3SA 08	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED WIESEHAN, TERRY JO HAWKINS HESTER, REBECKAH LYNNE LADD, KIM
332 items four Actions Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset	nd. Please refine your sean Position Number 0000340 00003491 00003491 00003618 00003619 00003663 00003663	ch criteria to narrow d Position Type AC S8 AC S8 SM S8 S8 S8 S8 S8 S8 S8 S8 S8 S8	Person Name: Bean lown your search. Pacul TY/INSTRUCT SR EXEC SEC II FACUL TY/INSTRUCT DIR.CTOR ALUM/CE DIR.OF CAMPUS LI EXECUTIVE SECRET CASE MGR/LTC COC	ition Description COB REPRONIES EE ARY SED	Department ID EA-SCI EA-CHAN EA-BUS EA-EXAF EA-SACI EA-ACAD EA-AQA	Salary SetId IUEAA IUEAA IUEAA IUEAA IUEAA IUEAA IUEAA	Plan AC1 CL AC1 PAE PAE CL PAE	Grade ETX 10 ETX 3PR 3SA 08 2PB	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED WIESEHAR, TERRY 30 HAWKINS HESTER, REBECKAH LYNNE LADD, KIM NOT FUNDED
Actions Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset	d. Please refine your seam Position Number 00000340 00003456 00003619 00003619 0000363 0000383 00003841	ch criteria to narrow d Position Type AC S8 AC SM S8 SM S8 SM S8 S8 S8 S8 S8 S8 S8 S8 S8	Sown your search. Pacul TY/INSTRUCT PACUL TY/INSTRUCT DIRECTOR AUM/OS DIR. OF CAUM/OS DIR. OF CAUM/OS	Rion Description COB COB COB COB COB COB COB COB	Cancel (extended)	Salary SetId JUCAA JUCAA JUCAA JUCAA JUCAA JUCAA JUCAA JUCAA	Plan AC1 CL AC1 PAE PAE CL PAE CL	Grade FTX 10 FTX 3PR 3SA 08 22PR 07	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED WIESERAN, TERRY JO HAWKINS HESTER, REBECKAH LYNNE LADD, KIM NOT FUNDED FOSTER, MARY JO
Actions Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset	nd. Please refine your seam Position Number 00000340 00003618 00003619 00003619 00003883 00003941 00003941	ch criteria to narrow d Position Type AC SB AC SM SB SB SB AC AC	form your search. Post Post Post Post Post Post Post Post	tion Description COB COB COB COB COB COB COB COB	Cancel extended	Salary SetId 10EAA 10EAA 10EAA 10EAA 10EAA 10EAA 10EAA 10EAA 10EAA	Plan AC1 CL AC1 PAE PAE CL PAE CL AC1	Grade FTX 10 FIX 28 328 08 22PB 07 AAE	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED WIESEHAN, TERRY JO HAWKINS HESTER, REBECKAH LYNNE LADD, KIM NOT FUNDED FOSTER, MARY JO RICHARDS, LAURENCE D
Actions Actions Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset	nd, Please refine your sean Position Number 00000540 00003491 00003491 00003663 00003619 00003663 00003941 00004517 00004517	ch criteria to narrow d Position Type AC SR AC SM SR SR SB SB AC AC	Person Name: Bean Jown your search. Paculity/INSTRUCT SR EXEC SEC II FACULITY/INSTRUCT DIRECTOR ALUM/CE DIR. OF CAMPUS LIP EXECUTIVE SECRET CASE MER/LIC COC ADM. SECRETARY CHARCELLOR DIRECTOR. LIBRAR	Rion Description COB EREMONIES FE ARY DRD X	Department ID EA-SCI EA-CHAN EA-BUS EA-EXAF EA-SACI EA-SACI EA-AQQ EA-AQQ EA-SCI EA-CIAN EA-LIBR	Salary SetId IUEAA IUEAA IUEAA IUEAA IUEAA IUEAA IUEAA IUEAA	Plan AC1 CL AC1 PAE PAE CL PAE CL PAE CL AC1 AC1	Grade FTX 10 ETX 3PR 3SA 08 2PB 07 AAE LTX	Person Name NOT FUNDED DILWORTH.RENA VAN VOORHIS NOT FUNDED WIESEHAN,TERRY 30 HAWKINS HESTER,REBCKAH LYNNE LADD.KIM NOT FUNDED FOSTER,MARY 30 RICHAROS,LAURENCE D YATES,FRANCES RUTH
332 items fou Actions Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset Posn Salset	d. Please refine your sean Position Number 00000340 0000345 00003619 00003619 00003643 00003833 00003843 00003841 00004517 00004623 00005705	ch criteria to narrow d Position Type AC S8 AC SM S8 SM S8 S8 S8 S8 S8 AC AC AC AC AC AC	Sown your search. Post FACULTY/INSTRUCT SR EXEC SEC II FACULTY/INSTRUCT DIR.OF CAUMYOS DIR.OF CAUMYOS DIR.OF CAUMYOS DIR.OF CAUMYOS ADM. SECRETARY CHANCELLOB DIRECTOR. LIBRAR	tion Description Cost Rise Montes Cost	Cancel extended	Salary Setid JUEAA JUEAA JUEAA JUEAA JUEAA JUEAA JUEAA JUEAA JUEAA	Plan AC1 CL AC1 PAE PAE CL AC1 AC1 AC1	Grade TIX 10 ETX 3PR 3SA 08 2PR 07 AAE LIX FLX	Person Name NOT FUNDED DILWORTH.RENA VAN VOORHIS NOT FUNDED WIESEHAN,TERRY JO HAWKINS HESTER,REBECKAH LYNNE LADD,KIM NOT FUNDED FOSTER,MARY JO RICHARDS,LAURENCE D YATES,FRANCES RUTH PRATER.AIMEE RENEE
Actions Actions Posn Salset Posn Salset	nd. Please refine your sear Position Number 0000340 00003491 0000366 00003618 00003663 00003643 00003941 00004517 00004517 00004523 00005705	ch criteria to narrow d Position Type AC S8 AC SM SM SM SB SM SB AC AC AC AC AC AC	Jown your search. Paculity/INSTRUCT SR EXEC SEC II PACULITY/INSTRUCT DIRECTOR ALUM/CE DIR. OF CAMPUS LIN EXECUTIVE SECRET CASE MGR/LTC COC ADM. SECRETARY CHANCELLOR DIRECTOR. LIBRARY LECTURER FACULITY/INSTRUCT	tion Description	Cancel extended EA-SCI EA-CHAN EA-SAGI EA-SAGI EA-SGI EA-SGI EA-SGI EA-SGI	Salary SetId JUEAA	Plan ACL CL AC1 PAE PAE CL PAE CL AC1 AC1 AC1	Grade E1X 10 FTX 3PR 3SA 08 2PR 07 AAE LTX ELX ETX	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED WIESEHAR, TERRY 30 HAWKINS HESTER, REBECKAH LYNNE LADD, KIM NOT FUNDED FOSTER, MARY 30 RICHARDS, LAURENCE D YATES, FRANCES RUTH PRATER, RAINEE RENE BULLOCK, DENISE MURIEL
332 Items fou Actions Posn Salset Posn Salset	nd. Please refine your seam Position Number 00000340 00003491 00003618 00003619 00003643 00003643 00003643 00003541 00004517 00004517 00005705 00005705	ch criteria to narrow d Position Type AC S8 AC SM S8 SM S8 SM S8 SM S8 AC AC AC AC AC AC	Jown your search. Paculty/INSTRUCT DIRACTOR ALWAYS PACULTY/INSTRUCT DIRACTOR ALWAYS DIRACTOR ALWAYS CAMPAGE CASE MGR/LTC COO ADM. SECRETARY CHANCELLOR DIRECTOR. LIBRART LECTURE FACULTY/INSTRUCT	Rion Description COB COB COB COB COB COB COB COB	Cancel (extended)	Salary Setid JUEAA JUEAA	Plan AC1 CL AC1 PAE CL PAE CL AC1 AC1 AC1	Grade FTX 10 FTX 3PR 3SA 98 2PB 0Z AAE LTX FIX	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED WIESEHAN, TERRY JO HAWKINS HESTER, REBCKAH LYNNE LADD, KIM NOT FUNDED FOSTER, MARY JO FOSTER, MARY JO RICHAROS, LAURENCE D YATES, FRANCES RUTH PRATER, AIMEE RENEE BULLOCK, DENISE MURIEL KRIESE, PAUL
332 items fou Actions Posn Salset Posn Salset	Desire refine your sean Position Number 00000340 0000346 00003618 00003619 00003619 00003619 00003619 00003619 00003619 00004623 00004517 00005705 00005706 00005711	ch criteria to narrow d Position Type AC S8 AC SM S8 S8 S8 AC AC AC AC AC AC AC AC AC	Sown your search. Porson Name: Bean FACULTY/INSTRUCT SR EXEC SEC II FACULTY/INSTRUCT DIR. OF CAMPUS LIP EXECUTIVE SECRET CASE MGR/LTC COX DOM. SECRETARY CHARCELLOB DIRECTOR. LIBAR? LECTUREB FACULTY/INSTRUCT FACULTY/INSTRUCT FACULTY/INSTRUCT FACULTY/INSTRUCT	Rion Description COB COB COB COB COB COB COB COB COB COB	Cancel extended	Salary SetId JUEAA	Plan AC1 CL PAE PAE CL PAE CL AC1 AC1 AC1 AC1	Grade FTX 10 FTX 3PR 3SA 08 2PR 07 AAE LTX FIX FIX FIX	Person Name NOT FUNDED DILWORTH, RENA VAN VOORHIS NOT FUNDED WIESEHAN, TERRY JO HAWKINS HESTER, REBECKAH LYNNE LADD, KIM NOT FUNDED FOSTER, MARY JO RICHARDS, LAURENCE D YATES, FRANCES RUTH PRATER, AMER RENEE BULLOCK, DENISE MURIEL KRIESE, PAUL

• 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			
		Current Level: 0		Account	Level Update Access		
		Level Chart/Org:		here a second	an photos for the state of the state of the		
		and the second se	200				
Controls Revenue (0)		2:IU-UNIV UNIV	/ERSITY LEVEL 💌 [pull	up report/	dump		
Controls Revenue (0)	C	2:IU-UNIV UNIV	VERSITY LEVEL 💌 [pull	up report/o	dump]		
Controls Revenue (0) Revenue	E	2:IU-UNIV UNIV	/ERSITY LEVEL 💌 pull	up_ report/c	dump]		show % adjust hide detail
Controls Revenue (0) Revenue • Object	SubObject	Ease Budget	/ERSITY LEVEL 👤 pull	up report/	96 Change		show % adjust hide deta
Controls Revenue (0) Revenue • Object	SubObject	2:IU-UNIV UNIV	/ERSITY LEVEL 丈 pull • Requested	up report/s	% Change		show % adjust hide detain the detaint of the detaint
Revenue (0)	SubObject	2:IU-UNIV UNIV hde Base Budget 355,035	PERSITY LEVEL ▼ Pull ■ Requested	up report/s	4ump % Change -100.00	_create month	show % adjust hide deta Action add
Revenue (0) Revenue Add: * Object J800 OTHIR DIC	SubObject	2:1U-UNIV UNIV nide Base Budget 355,035 355,035	PRESITY LEVEL ▼ pail * Requested	up report/s	4ump % Change -100.00 (100.00)	create month	show % adjust hide detain Action and ball inquiry
Controls Revenue (0) Revenue (0) Add: 0bject Stabil Revenue Actions	SubObject	Ease Budget 355,035	PERSITY LEVEL poll * Requested	up report/s	44mp % Change -100.00 (100.00)	[create month	Show % adjust hide detain Action add ball inquiry
Controls Revenue Add: Object IB00 OTHE INC Global Revenue Actions	SubObject	2:1U-UNIV UNIV	PRSITY LEVEL ▼ Pull	up report/s	% Change -100.00 (100.00)	[create month	show % adjust hide deta Action add [bal inquiry]
Controls Revenue Add: 0 bject 0 bject 0 bject 0 bject 0 bject 0 bject 0 bject 0 bject 0 bject	SubObject © Revenue Totals	2:IU-UNIV UNIV hide Base Budget 355,035 355,035 Adjust	VERSITY LEVEL Puil Requested By Percent:	up report/o	4ump 96 Change -100.00 (100.00)	_create month	show % adjust hide deta Action bal inquiry spreadmonth delete
Controls Revenue Add: 1800 Other Inc Global Revenue Actions Expenditure (368,222)	SubObject © Revenue Totals	2:IU-UNIV UNIV hide Base Budget 355,035 355,035 Adjust (how)	PRSITY LEVEL Puil Requested By Percent:	up report/o	9% Change -100.00 (100.00)	_create month	show % adjust hide deta Action add bal inquiry spread month delete
Controls Revenue Add: Book Controls Con	SubObject © Revenue Totals		VERSITY LEVEL Puil Requested By Percent:	up report/s	4ump 96 Change -100.00 (100.00)	_create month	show % adjust hide deta Action add bal inquiry spread month delete
Controls Revenue (0) Revenue Add: 0) Object Slobal Revenue Actions Expenditure (308,222) totes and Attachments (0) Dueb Les	SubObject		* Requested	up report/o	4ump 96 Change -100.00 (100.00)	create month refresh month	show % adjust hide detain Action add

• 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.

Expendit	ure					show % adjust hide detail
	* Object	SubObject	* Base Budget	Requested	% Change	Action
Add:	9			0		add
	2400		74,000	74,000	0.00	create month bal inquiry show benefits salary setting
	2500 NON-EX STAFF	242.7	63,169	63,169	0.00	create month bal inquiry show benefits salary setting
	4078 CONF/WRKSHPS	***	1,500	1,500	0.00	create month bal inquiry
	4085	***	1,320	1,320	0.00	create mosth bal inquiry
	4086	***	75	75	0.00	create month bal inquiry
	4100	***	582	582	0.00	create month bal inquiry
	4166	***	736	736	0.00	create month bat inquiry
	4300_		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	***	27,996	0	-100.00	bal inquiry
	5760_		9,602	0	-100.00	bel inquiry
	5772		11,788	0	-100.00	bal inquiry
	5773	ees.	7,991	0	-100.00	bot inquiry
	6000		1,000	1,000	0.00	create month bal inquiry
	7900 UNAL BAL	7%	-611	-611	0.00	create month bal inquiry
	9977	HMS	1,000	1,000	0.00	create month bal inquiry
		Expenditure Totals	208,653	151,276	(27.50)	

Salary Setting

• For quick salary setting click the salary setting link.

			Sub-Fund Grou	IP: EXTAGY	EX	TERNAL AGENCY FUNDS	
			Or	g: EW	FOI	RT WAYNE CAMPUS	
			Reports-To Chart/Or	G: IU UNIV	UN	IVERSITY LEVEL	
Next Year	r Data						
			Fiscal Yea	ar: 2014	-		
			Chart/Or	g: EW EW	FOI	RT WAYNE CAMPUS	
			Reports-To Chart/Or	g: IU UNIV	UN	IVERSITY LEVEL	
Approval	Level Data						
			Current Lev	el: 0	Acc	count Level Update Access	
TRANSPORT			Level Chart/Or	g:			
Controls							
			2:IU	UNIV UNIVERSITY LEV	EL 💌 pull up reg	port/dump	
Revenue	(0)		(b show)				
nevenue	(0)		(F allert				
Expenditu	ure (0)		+ hide				
Expendit	ure						show % adjust hide detail
	* Object	SubObject	* Base Budget	* Requested	% Change		Action
Add:		9		0			add
	2000		247,687	0	-100.0	0 create month bal inquiry	show benefits salary setting
	5625 FING BEN CST		50,553	0	-100.0	0 bal inquiry	
	5760 FICA		17,338	0	-100.0	0 bal inquiry	
	5772 RETIRE EXMPT	***	39,457	0	-100.0	0 bal inquiry	
		Expenditure Totals	355,035	0	(100.00)		
Global Ex	penditure Action	5					
			Adjust By P	ercent: appl	6	refresh month spread	month delete calculate benefits
Notes and	I Attachments (0)	• show				
Route Lo	a	545	+ show				
			head of control of the				
				() () () () () () () () () ()			

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

Ouic	k Salary Se	tting		-	hida)									
quici	n cului j ci			<u>.</u>	nue										
Ехро	enditure Sa	ilary Line	-	-	-	_	_		_	_	_	_	_	_	-
	Chart	Account		SubAcco	unt		Object		SubO	bject	Su	bFundGrpCd			Org
FW FORT V	WAYNE	9762701				2000	SALARY				EXTERNAL AGENC	Y FUNDS	FC	ORT WAYNE CAP	4PUS
		den de					add position	ad	d incumbent		6.1		14		
		over t								1					
Salar	ry Line Del	ail													show %
Del	Position	Name	Cls	Salary	Salary	Work Months	Pay Months	CSF Amt	CSF FTE	* Funding Month	* Requested Salary	Requested	Change		Actions
F	00013831	CODISPOTI,MARGIT E.	LC	AC1	LTX	12	12		1.00000	12	0	1.00000	(100.00)	posn salset	inembra
1		· / · · · · · · · · · · · · · · · · · ·												vacate de	elete
F	00014117	SKEKLOFF.SUSAN DIANE	LC	AC1	LTX	12	12		1.00000	12	0	1.00000	(100.00)	posn salset	incmbnt
100									-					vacate de	elete
	00014316	TRUESDELL, CHERYL B.	ц	AC1	AAI.	12	12		1.00000	12	0	1.00000	(100.00)	posn salset vacate de	incmbnt
				· · · · ·			Total:		3.00000	2	0	3.00000	(100.00)		
					Ехр	enditure L	ine Base:	10/100	Req:		0		(100.00)		
Glob	al Actions														
								Adju	st: % 💌	1.5	apply	Refresh	Position?	Refrest	n Incumbe

- 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.

к занату эс	tting			♥ hide	5										
anditura Sa	land line	_	_	_	_	_	_	_	_	_	_	_		_	
Chart	Account		SubAc	count		Object			Sub	Object		Sul	FundGrpCd	-	Org
NAYNE	9762701 FW-LIBRARY				ACADENIC	SALARY	**	**			EXT	TEIMAL AGENCY 8	UNDS.	FORT	WAYNE CAMPUS
						add positio	a a	dd incun	bent						
ry Line Det	ail									_			_	_	hide % adjust
Position	Name	Cls	Salary Plan	Salary Grade	Work Months	Pay Months	CSF Amt	e F	SF TE	* Funding Month		* Requested Salary	Requested FTE	Change Percent	Actions
00013831	CODISPOTI_MARGIT_E.	LC.	ACL	LTX.	12	12		3 1.0	0000	12	: 	0	1.00000	(100.00)	posn salset. Incmbnt salset
										Adjust: %	•		apply		vacate delete
00014117	SKEKLOFF, SUSAN DIANE	LC.	AC1	LTX.	12	12		Z 1.0	0000	12		0	1.00000	(100.00)	posn salset incmbnt salset
										Adjust: %	•	[apply		vacate delete
00014316	TRUESDELL, CHERYL B.	щ	AC1	AAL.	12	12		8 1.0	0000	12		0	1.00000	(100.00)	posn salset incmbrit salset
								1		Adjust: %	-		apply		vacate delete
					Expenditure	Total:		3.0	0000 Rea:			0	3.00000	(100.00)	
al Actions						Circ Dusci			i cqi					(100100)	
							A	djust:	%			apply	Refresh Po	sition?	Refresh Incumbent?
	enditure Sa Chart wave Position 00013831 00014112. 00014112.	enditure Salary Line Chart Account 2762701 Precision Name 00013831 CODISPOTI,MARGIT E. 00014112 SKEKLOFF,SUSAN DIANE 00014316 TRUESDELL,CHERYL B. 20014316 SKEKLOFF,SUSAN DIANE	enditure Salary Line Chart Account 2752701 ProclassAry ry Line Detail Position Name Cts 00014312 SKEKLOFF, SUSAN DIANE LC. 00014316 TRUESDELL, CHERYL B., LL bal Actions	enditure Salary Line Chart Account SubAc 762701 ***** ry Line Detail Position Name Cls Salary Position CODISPOTI MARGIT E. LC. ACL 00014112 SKEKLOFF.SUSAN DIANE LC. ACL 00014115 TRUESDELL.CHERYL B. LL ACL 20014316 TRUESDELL.CHERYL B. LL ACL	enditure Salary Line Chart Account SubAccount 2762701	enditure Salary Line Chart Account SubAccount 2000_ ACCOUNT ACCOUNT ACCOUNT 2000_	enditure: Salary Line Chart Account SubAccount Object 2000_ACODEC ELLARY ACCOUNC ELLARY ACCOUNC ELLARY ACCOUNC ELLARY ACCOUNCE ELLARY ACCOUNCE ELLARY ACCOUNCE ELLARY ACCOUNCE ELLARY Position Name Cts Salary Salary Work Pay Grade Months Months 00014312 CODISPOTI_MARGIT E. LC. ACL LTX. 12 12 12 00014112 SKEKLOFF.SUSAN DIANE LC. ACL LTX. 12 12 Total: Expenditure Line Base: bal Actions	enditure: Sistary Line Chart Account SubAccount Object Parket 2762701 ***** 2000 Account: Calabry add position: a ry Line Detail Position Name Cls Salary Grade Months Months Annt CSF Plan Grade Months Months Annt CO018831 CODISPOTI, MARGIT E. LC. ACL. LTX. 12 12 12 00014112 SKEKLOFF, SUSAN DIANE LC. ACL. LTX. 12 12 00014112 SKEKLOFF, SUSAN DIANE LC. ACL. LTX. 12 12 DO014116 TRUESDELL.CHERYLB. LL ACL. AAL 12 12 Expenditure Line Base:	enditure: Salary Line Chart Account SubAccount Object Account 2000 Account 2000 Ac	enditure: Salary Line Chart Account SubAccount Object Sub Account 2000_ ACADENC SULARY ACADENC SULARY add jocation add incumbent ry Line Detail Position Name CIS Salary Salary Work Pay 0001831 CODISPOTI_MARCIT E. LC. ACL LTX, 12 12 12 00014112 SKEKLOFF.SUSAN DIANE LC. ACL LTX, 12 12 12 00014112 SKEKLOFF.SUSAN DIANE LC. ACL LTX, 12 12 12 00014112 SKEKLOFF.SUSAN DIANE LC. ACL LTX, 12 12 12 00014116 TRUESDELL.CHERYLB., LL ACL AAL 12 12 12 Expenditure Line Base 1 3.00000 1 3.00000 1 3.00000	enditure: Sistary Line Chart Account SubAccount Object SubObject SubObject SubObject Account Proc.IBRARY and SubObject SubObj	enditure: Sslary Line Chart Account SubAccount Object SubObject SubObject Proceedings of the subObject SubObject Account Account Proceedings of the subObject Pr	enditure: Salary Line Chart Account SubAccount Object SubObject Sul Account 2000 Account 2000 Account SubAccount Object SubObject Sul Account SubAccount Account Account Object SubObject Sul Account SubAccount Account	enditure: Sslary Line Chart Account SubAccount Object SubObject SubDiject SubFundGrpCd PX-LE 2000	Position Name Cls Salary Work Pay CSF Fundment File Requested Change Percent Control SubObject SubObject

- 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 a	il collapse
Incumb	ent		✓ hide									
Incumb	pent		_		_		_	_		_		
	* Empl	d: 00006079	63		Nan	e: NUSBAU	MER, M R				Cls: PR	
	Sal Set	d: IUFWA			Pla	n: AC1					Sal Grade: EI	٤
Incumb	ent Funding		· hide									
1	\frown											
* nide	Add Funding	count	Sub Account	t Object	Cub	Object	Docitio		Work Nonthe	Day Months	ETE	Boct
Der	- Charles - Alc		Sub Account	- Object	J	()	Positio	- -	WORK MOIICIS	Pay Months	ric.	PUSI
						1.95	ð				-	
			Row Operatio	m	Amount	Hourly Rate	Months	Percent Tim	e FTE	Reason Select	Reason Amount	
	Reques	ti			[[
	Leave Request CS	NONE			l							
	Total Intender				ſ	-						
												add
• hide	FW, 9762174,, 2000	,, 000060	7963, 00007158									
Del	* Chart * Ac	count	Sub Account	* Object	Sub O	bject	Position	(Work Months	Pay Months	FTE	Post
E.	FORT WAYNE FW-SOCIO	LOGY		ACAD SALARY			PACULTY/INST	RUCTOR	0	10	1	ET1
			Row Operatio	on	Amount	Hourly	Months	Percent Time	FTE	Reason Select	Reason	1
	cs	F: Adjust: 9		apply		1		100.0	1.00000			
	Reques	t:		>	1	j o	10	100.0	1.00000		1	(swill
	Leave Request CS				Ε	5		0.0	0.00000			
	Total Intende					0			0.00000			1

- 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 Accor	int * Object	Sub Obje	ct	Position		Work Months	Pay Months	FTE	Post
П	FW. FORT WAYNE	9762174 FW-SOCIOLO	GY	2000_ ACAD SALARY			00007158 FACULTY/INST	LUCTOR 10		10	1	FT1
			Row O	peration	Amount	Hourly	Months	Percent Time	FTE	Reason Select	Reason	í.
		CSF:	Adjust: 1%	apply	77,706			100.00	1.00000			1
		Request:		<	70,985	> °	10	90	0.90000	Promotion - Academic	1,16	3
	Leave R	equest CSF:			0			0	0.00000			
	Tot	al Intended:			0				0.00000			1
												delet
tride	FW, 9762701,	, 2000, -	, 0000607963, 0000	07158	Cub Obla		Dealthea		Wash Master	Day Martha		Dent
E Cel	EW_	9762701 PW-LIBRARY		2000_ ACAD SALARY		a	00007158	wctos 10	WORK MORITIS	10	1	ET1
			Row O	peration	Amount	Hourly	Months	Percent Time	FTE	Reason Select	Reason Amount	1
		Request:			7,887	$>^{\circ}$	10	10	0.10000			
	Leave R	equest CSF;	NONE -		0			0	0.00000			1
	Tot	al Intended:			78,872	$\mathbf{>}$			0]
											pu	rge delet
• hide	Totals											
	6				Amount			Standard Hours	FTE			
		CSF:			77,706			40.00	1.00000			
		Request:			78,872			40.00	1.00000			
	Leaves F	equest CSF:			0			0.00	0.00000			3
	and the second second	or comparison		Restances 1								

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

Creme	o diturn Ca	Investigation in the second	_	_			_	_	_	_	_	_	_	
схре	Chart	Account		SubAce	ount		Object		SubC	bject	Su	bFundGrpCd		Org
W.	VANNE	9762174 FW-SOCIOLOGY				2000	SALARY		•		EXTERNAL AGENC	Y FUNDS	FOR	RT WAYNE CAMPUS
		1.0000000000				Transferre	add position	n ada	d incumbent					
Galar	at Line Det	511	_											a design of the section of
Salar	y Line Det		_											snow ve adjust
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
	00007158	NUSBAUMER,M R	PR	AC1	FTX.	10	10		1.00000	10		1.00000	1.50	vacate delete
	00007174	ASHTON, PATRICK JAMES	PC	AC1	ETX.	10	10		1.00000	10		1.00000	1.50	posn salset incmbnt salset
_							1020							vacate delete
	00013595	IADICOLA,PETER	PR.	ACL	FIX	12	12		1.00000	12		1.00000	1.50	vacate delete
							Total:		3.00000			3.00000	1.50	
ole b		_	_	_	Ex	penditure	Line Base:	1. IN	Req:	_			3.71	
GIOD	al Actions		-	_	_	_			. 06	r	apply	E		E.c
								Adju	ist: 70 🔟		(abbet	I Refresh I	Position?	I Refresh Incumbent?

- 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.

				Positio	n Number:	00016995									
				Posi	tion Type:	6	9								
				Departme	ent Set Id:										
				Dept	.ID Chart:			9							
				De	pt.ID Org:		9								
			Res	ponsibility Cer	nter Code:		9								
				Position De	escription:		_								
				Sala	ry Set Id:										
			Pos	ition Salary Pla	in Default:		9								
			Positi	on Salary Grad	le Default:		9								
				Position Un	ion Code:										
							search cl	lear cancel	get new						
ction <u>Unit</u> Fisc	iversity cal Year	Position Number	Position Lype	Department Set Id	Position Departme Identifie	ent B er 9	esponsibility 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
0 <u>set</u> sn : 014	4	00016995	SM	IUBLA	BL-BAP	Z4		ASSISTANT VICE PRESIDENT	R	IUBLA	PAE	xx		No	A

- 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.

_	* *	ear: 2014		Position:	00016995	es 1		Position Desc:	ASSISTANT VICE PRE	SIDENT	
	Default Object Co	de: 2400	1	Department Identifier:	BI-BAP	- · ·	10	h Code Set Id:	TUBLA		
	Job Co	de: 001874		Salary Plan:	PAE			Salary Grade:	xx		
	Work Mont	ths: 12		Pay Months:	12		St	andard Hours:	40.00		
	F	TE: 1.00		Pos Eff Date:	03/20/201	2					
Position	1 Funding		• hide								
▼ hide	Add Funding										
Del	* Chart *	Account	Sul	b Account	* Object		Sub Object	* Emp	lid	Cls	Post
Π	UNIV ADMIN	201 SUDGET OFFICE	1	9	400_ ROF SAL	[٩		0		
		Ro	w Operation	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount	
	Request:										
	Leave Request CSF:	NONE .		ţ.							
	Total Intended:				1						
• hide	DI 1000000 0100		0015005								add
Del	* Chart	* Account	Sub Acc	ount *	Object	SI	ub Oblect	* Emplid		Cls	Post
E	BL BLOOMINGTON	UDOETARY AFFAIRS		2400 EXMPT	STAFF		o object	0001785912 GERSTMAN,ROSA	u	-	
		Ro	w Operation	Amount	Hourly Rate	Months	Percent Time	FTE	Reason Select	Reason Amount	
	CSF:	Adjust: %	apply	77,87			50.00	0.50000			
	Request:				0 0	12	50.00	0.50000		F	0
	Leave Request CSF:	NONE -			5		0.00	0.00000			
	Total Intended:				ō			0.00000			
										V	cate 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								
				Positio	n Number: 00038	1285								
				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 cl	ear cancel	get new						
ctions	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
n set n set	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

					EW/	CODT	VAVALE CAMPLIC		
			Panorts-To Chart/Or	J: 1. TL	LINDV	LINIVES			
Next Year	r Data		Reports To Charty org	10	ONLY.	UNIVER	COLL CEVEL		
The second second			Fiscal Year		2014				
			Chart/Ore	EW	FW	FORT V	VAYNE CAMPUS		
			Reports-To Chart/Org	1: IU	UNIV	UNIVEF	ISITY LEVEL		
Approval	Level Data								
			Current Leve	1: 0		Account	t Level Update Access		
			Level Chart/Org	j:					
Controls	(
			2:IU-	UNIV UNI	VERSITY LEVEL	poll up report/	dump		
Dennen	(0)		[between]						
Revenue	(0)		E SHOW						
Expenditu	ure (0)		• hide						
Expendit	ure							show % a	tjust hide detail
	* Object	SubObject	* Base Budget	* Re	quested	% Change		Action	
Add:		9			0			add	
	2000_	***	247,687	6	256,887	3.71	create month bai inquiry	show benefits salary setting	<u>s</u>
5	2PLG	4440	0		-368,222		bal inquiry		delete
_	5625		50 552		52 421	3.71		1	Augenetics and
	FRING BEN CST		30,333		52,452	J-7 4	Datinguiry		
	5760	222	17,338		17,982	3.71	bal inquiry		
	5772		39,457		40,922	3.71	bal inquiry		
	Incluse Contra	Expenditure Totals	355,035		0	(100.00)			
Global Lx	penditure Actio	ins							
			Adjust By Pe	ercent:	apply		refresh month spread	month delete calculate ber	iefits
Notes and	d Attachments (0)	+ show						
Route Lo	a	280	+ show						

- 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	pen			
	my accounts	my organization		
	Chart	Account	Sub Account	Action
	UA UNIV ADMIN	1912201 S UNIVERSITY BUDGET 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: U-UNIV I UNIV (UNIVERSITY LEVEL)	
Previou	s Branches		
3	IU - UNIV	UNIVERSITY LEVEL	
Organiz	ation Sub-Tree		
Selecte	d	Organization Sub-Tree	Action
	BL - BL	BLOOMINGTON CAMPUS	
	EC. EA	EAST CAMPUS	
1	EW EW_	FORT WAYNE CAMPUS	(1)
5	IN IN.	IND UNIV-PURDUE UNIV INDPLS	
	IU IU2.	IU2 DEPARTMENT	
	KO KO_	KOKOMO CAMPUS	(*)
	NW - NW	NORTHWEST CAMPUS	(4)
	SB SB.	SOUTH BEND CAMPUS	
	SE SE.	SOUTHEAST CAMPUS	
-	UA - UA	UNIVERSITY ADMINISTRATION	4
		select all clear all	1
Reports	And Exports	[▼ hide]	
Reports	VIEW	Account Funding Detail	
	view	Account Object Detail (coosolidated)	
	view	Account Summary Consolidated	
<u> </u>	hand do Carbons	Account Summary In (consolution)	

- 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.

					Indian	a Universit
					2013-14 OF	ERATING BUI
Organization Sel	ection	1				
Chart:	FW	FORT	WAYNE			
Organization:	FW	FORT	WAYNE	CAMPUS		
Chart:	FW	FORT	WAYNE			
					20	13-14
Account / Sub:	Accou	unt/Sub	Name		Req.	Amount
9762204	MANA	GEMENT &	MARKE	TING		-343,007
9762701	FW-L:	IBRARY				-317,414

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

		Chart/Org		Organization		
and the second se	T IU - UNIV		UNIVERSITY LEVEL			
Organiz	zation Sub-Tree		Organization	Sub-Tree		Action
	BL - BL	BLOOMINGTON	CAMPUS			÷
1	EA EA	EAST CAMPUS				
1	EW EV	FORT WAYNE C	CAMPUS			(*)
	IN - IN	IND UNIV-PURD	DUE UNIV INDPLS			
	10 - 102	IU2 DEPARTMEN	NT			
	KO KO.	KOKOMO CAMPI	us			+
	NW - NW	NORTHWEST C	AMPUS			1
	SB SB.	SOUTH BEND C	CAMPUS			4
	SE SE.	SOUTHEAST CA	MPUS			+
	UA UA.	UNIVERSITY AD	MINISTRATION			+
			Supported Lange and			
Reports	s And Exports	► hide				
Reports	s And Exports	[▼ hide]				
Reports Report	s And Exports s	✓ hide Account Funding Detail				
Reports Report-	s And Exports s view	Account Funding Detail Account Object Detail	red)			
Reports Reports	s And Exports s view view	Account Funding Detail Account Object Detail Consolidated	sked)			
Reports	s And Exports s view view view	Account Funding Detail Account Object Detail Account Summary Consolidated Level Summary	steed)			
Reports	s And Exports s view view view view view	Account Funding Detail Account Object Detail Account Summary Consolidated Level Summary List 24.6	sted)			
Reports	s And Exports s view view view view view view view	Account Funding Detail Account Object Detail Account Summary (consolidated Level Summary Ust 2PLG Monthly Object Summary (consol	ted)) okdated)			
Reports	s And Exports s view view view view view view view view	Account Funding Detail Account Object Detail Consolidated Level Summary Ust 2PLG Monthly Object Summary Consol	sted) i) plidated)			
Reports	s And Exports s view view view view view view view view	Account Funding Detail Account Object Detail Account Summary (consolidated Level Summary Ust 2PLG Monthly Object Summary Object Summary Payroll Synchronization Problems	sted))) olidated)			
Reports	s And Exports s vee vee vee vee vee vee vee vee vee	Account Funding Detail Account Object Detail (consolidated Level Summary (consolidated Level Summary List 2PLG Monthly Object Summary Payroll Synchronization Problems Position Funding	steed)) plidated)			
Reports	s And Exports s von. von. von. von. von. von. von. von.	Account Funding Detail Account Object Detail (consolidated Level Summary List 2PLG Monthly Object Summary (consol Object Summary Payrol Synchronization Problems Position Funding Reason Statistics	sted)))			
Reports	s ven ven ven ven ven ven ven ven ven ven	Account Funding Detail Account Object Detail Account Summary Level Summary List 2PLG Monthly Object Summary Payroll Synchronization Problems Position Funding Reason Statistics Reason Summary	sted) i) plidated)			

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.

	object List Selection			
	Select		Object Code:	Object Description:
5)	2000		ACADEMIC SALARY
			Percent Change Threshold:	
			Include records that are:	greater than or equal to threshold Cless 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	Appointment Funding 6	Reason Code: Appointment Funding Reason Description:			
Select	repondent runding r				

• Click submit and the report will be generated.

	1	indiana University			
Organization Selection Chart: FW FORT WAYNE Organization: FW FORT WAYNE Objects: 2000	CAMPUS	-14 OPBRATING BOLGE			Pagel Excluded Reasons: PRO
Name	Cla			Leaves	Total
	Position	CSF Base	2013-14	CSF	Intended
Cht/Acct/Sacct/Object/Sobj Posn#	AP SPin Grd WM/PM	Salary Pctime Mt	Salary Pctime	FTE Code	Amount FTE
					Amt Chg Pct Chg
ARGAST, ANNE S.	PR				
FW 9762132 2000 00007148	FT1 AC1 FTX 10/10	75,260 100.	.00		0 0.00000
00007148	2013:10/10	0 100.	.00		0 0.0%
ASHTON, PATRICK JAMES	PC				
FW 9762174 2000 00007174	AA AC1 FTX 10/10	61,895 100.	. 00		0 0.00000
00007174	2013:10/10	61,895 100.	. 00		928 1.5%
BARTKY, ELLIOT M	PT DEL DEV 10/10	c1 0/25 100 /			0.0.00000
FW 9762164 2000 00013203	PTS ACT PTA 10/10	01,005 100.	.00		0 0.00000
CODICIONI MADOIT P	2013:10/10	0 100.			0 0.04
EW 9762701 2000 00013831	LT2 AC1 LTX 12/12	54.523.100.	. 00		0.0.00000
00013831	2013: 12/12	54,523 100.	. 00		818 1.58
COOPER.MARY DANUSIS	PR				
FW 9762403 2000 00007156	AAJ AC1 FTX 10/10	74,195 100.	.00		0 0.00000
00007156	2013:10/10	0 100.	.00		0 0.0%
CRISMORE, AVON GERMAINE	PR				
FW 9762123 2000 00007172	FT1 AC1 FTX 10/10	70,794 100.	.00		0 0.00000
00007172	2013:10/10	0 100.	.00		0 0.0%
DILTS, DAVID ALLAN	PR				
FW 9762203 2000 00007155	FT1 AC1 FTX 10/10	109,987 100.	.00		0 0.00000
00007155	2013:10/10	0 100.	.00		0 0.0%
FARLOW JR, JAMES O.	PR PTI ACL PTY 10/10	07 020 100	00		0.0.00000
FW 9762132 2000 00007195	FTI ACI FTA 10/10	97,239 100.	.00		0.00000
ENDIGNODEL DODNEY	2013:10/10	0 100.	.00		0 0.04
FW 9762123 2000 00007183	FT1 AC1 FTX 10/10	73.632.100.	. 00		0.0.00000
00007183	2013: 10/10	0 100.	.00		0 0.0%
FISCHER, BERND JURGEN	PR				
FW 9762136 2000 00007198	FT1 AC1 FTX 12/12	98,774 100.	.00		0 0.00000
00007198	2013: 12/12	0 100.	.00		0.0%
GRANT, JANE A.	PR				
Organization Salary Summary - 1/16/	13 12:42 PM	÷	= Total Intended	Discrepancy	* = Marked Delete

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						
			Initiator:	kfs	Created:	03:00 PM 01/3
					expan	d all collapse
Document Overview						
Document Overview			_	-	_	8
Description: Budget Construction	2014 FW 9762701		Explanation	Budget Cor	nstruction	
Organization Document Number: 2014			C)	1. 17		
System Information						
System Information						
Fiscal Year:	2013					
Chart/Account: EW	9762701	FW-LIBRARY				
Sub-Account:		CAREDUAL ADDIES	united.			
Sub-Fund Group:	EXTAGY	EXTERNAL AGENCY F	UNDS			
Reports To Chart/Org: 11	LINEV	INNVERSITY LEVEL	5			
Next Year Data	30362	one contraction of the second				
Fiscal Year:	2014					
Chart/Org: FW	FW	FORT WAYNE CAMPU	s			
Reports-To Chart/Org: 1U	UNIV	UNIVERSITY LEVEL				
Approval Level Data						1
Current Level: 2						10
Level Chart/Org: 🔟	UNIV	UNIVERSITY LEVEL	/			
Controls						1
1-EW-EW FORT W	AYNE CAMPUS	push down report/dump				
Revenue (0)						
Conservations (0)						
experioritore (0)		1				
Expenditure				1 1	how % adjust	hide detail

• The list of available reports will be return.

teport/Export	* hide
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

- 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.