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/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 \text{org pull up} button.
  • The Organization Selection screen is displayed, select Both and click \text{pull up}.

• The selected Pull Up was successful message will be returned.
  • Click the \text{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 \text{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 – Show Budgeted Accounts

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

• 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.
• 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.

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

• 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.

**Salary Setting**

- For quick salary setting click the salary setting link.
- Detailed funding lines for the account, object, incumbent and position are displayed.

- 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.

- To view all the funding lines for an employee or to budget an individual employee line click the **incumbent sal set** button.

- The Salary Setting by Incumbent screen is displayed.
• 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.

• When the position is budgeted click **save** and **close** to return to the quick salary setting screen.
• 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 returned. To immediately move to a particular position number, enter the position number and click search.

• 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.
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.

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.
- 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**

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

**Budget Construction Selection**

- Select your point of view.
• Click the **view** button beside the report you want to run. REMEMBER – wait for the process to complete and do not close the browser window.

• Always run the 2PLG report to verify all have been handled.

• 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.

- 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.

- Click submit and the report will be generated.
To run a report for a single account while in the Budget Construction Document screen, click the button.

The list of available reports will be returned.

Click the button and the report will be generated.

Click to return to the account view.

Click to return to the Budget Construction Selection screen.