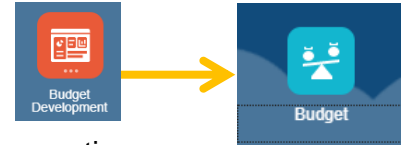


The last step in the process for creating a fiscal budget is to review the remaining non salary accounts and to enter a budget for each. Data entry must be done at the 6 digit Fund and Organization level however, viewing can be at higher level.

## Budget

Click on the **Budget Development** tile then select **Budget**.



This will display a summarized view of all compensation and non compensation accounts. Your budgeted amounts for compensation will only be visible in this view if you have pushed the data from the compensation planning tile or have waited for the overnight refresh. If the information does not appear, ensure you have resolved all the orange cells in the **Rev Empl GL Account Assoc.** tile.

## Budget – Expanded Account Single Fund View (Budget Summary View)

Viewing the non-salary accounts (type 70) at the 3 digit level, enter the budget for each account.

1. Click on the plus icon in the current **Original Budget 20XX/XX Fiscal Total** column to expand the display of all months of the year.
2. Review the accounts listed and enter in the white cells total amounts in either the Fiscal Total column or in each month individually.


Original Budget
2018/19
+ Fiscal Tot

**Note:** Grey or shaded cells are not data enterable. Non Compensation accounts will not be able to be changed in this form. If you do require changes to be made, you must return to the *Compensation Planning* tile.

3. Click **Save** when finished entering amounts.

If an amount will remain the same for an account as the previous year:

1. Right click in the cell of the previous year or the actuals for the year before and select **Seed Plan Year from Selected Year – Selected Account Group**.
2. A window will appear to **Enter Growth Rate**. This will increase the amount from the previous year's budget by a percentage. If no growth rate should take place then enter 0.
3. Click **Launch** for the amounts to populate.

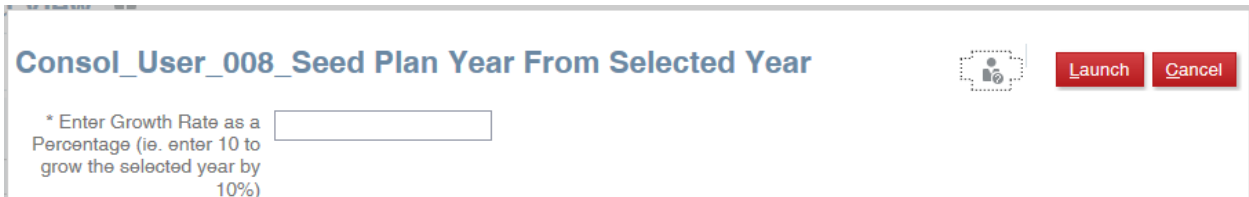
**Consol\_User\_008\_Seed Plan Year From Selected Year** 

Launch
Cancel

\* Enter Growth Rate as a Percentage (ie. enter 10 to grow the selected year by 10%)

4. The form will automatically collapse. Click on the icon to expand the column again. The amount(s) from the chosen account will have automatically populated in the current working budget just as the previous year. Click **Save**.

If an amount will remain the same for all accounts from the previous year:

1. Right click in the cell of the previous year or the actuals for the year before and select **Seed Plan Year from Selected Year – All Non Comp Accounts**.
2. A window will appear to **Enter Growth Rate**. This will increase the amount from the previous year's budget by a percentage. Enter 0 if no growth rate should take place then click **Launch**.



**Consol\_User\_008\_Seed Plan Year From Selected Year**

\* Enter Growth Rate as a Percentage (ie. enter 10 to grow the selected year by 10%)

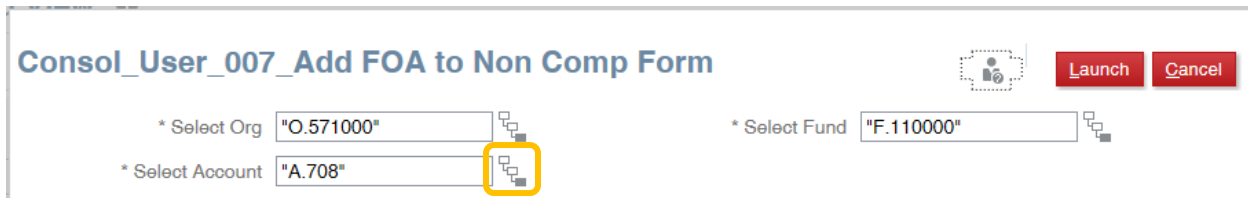
Launch Cancel

3. The form will automatically collapse. Click on the icon to expand the column again. The amount(s) from the chosen account will have automatically populated in the current working budget just as the previous year. Click **Save**.

### To Add an Account:

When working with a new Fund Org, you may not have any accounts listed to budget. In this case, you will need to add the accounts needed for the Fund you are working with in the form. **Note:** For Revenue (type 50) and/or Fund Transfer (type 80), you must select the accounts at the 6 digit level to be added to the budget.

1. Right click in a cell then select in the drop down menu, **Add New FOA**.
2. In the window that appears, click on the **Member Selector icon** and choose an account to add.



**Consol\_User\_007\_Add FOA to Non Comp Form**

\* Select Org "O.571000" \* Select Fund "F.110000"

\* Select Account "A.708"

Launch Cancel

3. Click **Launch** when account has been selected. You will be returned to the budget page with the new account added to the list. **Note:** The column will automatically collapse, click on the expand icon to return to the view of the fiscal year.

## **Additional Views**

Use the following views for more details or high level view:

- Expanded Account View
- Collapsed Account View (higher level view using account types only)
- Direct Tuition Revenue and Expense View (highest view level)
- Org Summary View (high level view of Faculty)

## Optional Tiles

The following tiles are yet to be used in the planning activities however they can be useful with an overview of your current budget and beginning to plan the next fiscal year.

- **5 Year Plan:** Budget for 5 years
- **Trending Analysis:** Graphing of budgeted amounts. Click on the graph for more details or choose settings to use a different chart.

## Org Status Review

Mark your budget as either In Progress or Ready for Review. This will give a view of all Faculty departments. You may also change the status while in the Budget tile.

1. Right click in a cell and select in the drop down menu, **Update Org Status**.
2. In the window that appears, choose the appropriate status (**In Progress** or **Ready for Review**).

**Note:** *Business Managers are the only group of individuals that can mark a budget as Complete.*