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# BudgetPak User Guide

Lewis & Clark College

October 2016



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## Contents

Overview .....	2
Definitions and Set Up .....	2
Logging In to BudgetPak .....	3
Reviewing Current and Historical Budget and Actual Information.....	4
Creating Your Budget.....	5
Using the Budget Navigation Page to enter Annual Budget Amount.....	7
Viewing Budget Reports.....	15
Completing and Signing-off on your Budget.....	20
<b>Appendix 1 - Notes and Files .....</b>	<b>21</b>
<b>Appendix 2 - ActionPaks – Budgeting for Specific Projects.....</b>	<b>24</b>
<b>Appendix 3 - Reviewing Headcount &amp; Salaries .....</b>	<b>29</b>
<b>Appendix 4 - Approving Budgets .....</b>	<b>39</b>

## Overview

This Getting Started Guide contains instructions for how to complete your FY2018 Budget (please contact BudgetPak Administrator to find out the current working version). BudgetPak is a web-based software tool that enables consolidation of budget and forecast inputs from across the institution. In some cases, it may also be used for reporting throughout the year.

BudgetPak supports several levels of users. The capabilities you are granted in BudgetPak depend upon your BudgetPak “role,” which the Administrator has assigned to you based on your budget responsibilities within your department. Each user’s role is associated with his or her user login profile.

Your BudgetPak Administrator is Xi Zhong. If you have any questions you can reach her at x7814. You can also contact Katherine Shallenberger at x7810 for assistance.

## Definitions and Set Up

Before beginning to budget, it is important to understand a few terms at Lewis and Clark and how they are used in BudgetPak. The Lewis & Clark account string is comprised of 11 digits. The first seven digits define the specific L&C school and department. These seven digits are referred to as the “**unit**” in BudgetPak. The last four digits of the L&C account string, sometimes referred to as the object code at L&C, describe the type of expense incurred. In BudgetPak, these last four digits are called the “**account**.” For example:

Full Account: 30 0 0067 6000

BudgetPak Unit: 30 0 0067 College of Arts & Sciences (300) Music Department (0067)

BudgetPak Account: 6000 Supplies Expense

BudgetPak distinguishes between “**base units**” and “**rollup units**.” Base units are the departments where budgets are reviewed and entered, as in the example above. “Rollup units” are special units designed to consolidate or subtotal a group of base units. These units do not have a distinct budget, but hold the subtotal of all base units below. Most BudgetPak users will be dealing with base units.

In BudgetPak your unit(s) and their accounts have already been set up for you. You will be accessing each account and entering its annual expense or revenue budget amount

Fiscal year runs from June 1 through May 31. FY2015 Actuals, FY2016 Actuals and FY2017 Budget have been loaded into BudgetPak for reference. The instructions below describe how to view and print reports, so that you can use these numbers as a guide to creating this year’s budget.

## Logging In to BudgetPak

Recommended Browser: **Firefox**

To open BudgetPak:

1. Locate the [BudgetPak link](#) that has been emailed to you. Note: The link is also available on the Business Office website. The BudgetPak Log In box displays.
2. In the first box, enter the username you use to access your computer and email.
3. In the second box, enter the password that was assigned to you.
4. Click the **Log In** button.
5. Change your password when prompted if it is your first time logging in to BudgetPak.

### Recommended BudgetPak Work Flow:



## Reviewing Current and Historical Budget and Actual Information

If you would like to create your Budget without reviewing the current or historical Budget and Actual Report, please skip this section and move to the next section, Creating Your Budget. To start by reviewing historical and current budget information, click on **Reports** on the navigation bar.

- Step 1, Select the **Unit** and **Version** you would like to review before budgeting.
- Step 2, Run and review current and historical reports
  - Click **View** under My Budget Summary box to review the P&L report for a specific version you selected
  - Select the comparison report you would like to view under My budget versus... box to run the comparison report

**BudgetPak™**  
Budget. Forecast. Report.

Home Versions Status **Reports** Configuration About

Select a report to preview:

Unit: 40 0 5301: Business Office  
Version: 2017 Budget

**My budget summary**  
Run a summary P&L report of 'Business Office', version '2017 Budget'

**View**

**My budget versus...**  
Run a summary P&L report for 'Business Office', comparing version '2017 Budget' against...

- ...propose budget (version '2018 Prelim Budget')
- ...current year budget (version '2017 Budget')
- ...current year actual (version '2017 Actual')
- ...prior year actual (version '2016 Actual')

**View** **View** **View** **View**

**My budget decisions**  
Run a detailed report listing the decisions that went into the budget for 'Business Office', version '2017 Budget'.

**View**

Or make different report selections:

**Advanced reporting**  
Select a different report, or choose different ways to see the above reports.

**View**

**Saved report selections**  
Run one of my saved reports.

**View**

Note: More detail instruction for Reporting can be found in **Viewing Budget Reports** section.

## Creating Your Budget

NOTE: All Budgets were started for you using prior budget.

From the Main Menu:

1. The first time you login, select **Open Different** to view and modify a unit budget. If you have already started a budget, you may select **Open Last** to return to the previous unit.

The screenshot shows the BudgetPak Main Menu. On the left, a sidebar contains information about the current unit and version, along with a 'View your messages' button. The main area features five buttons: 'Create new', 'Open last', 'Open different', 'Review status', and 'Run reports'. Annotations include a green box around 'Open last' with a callout 'Click here to open the last version and unit you were working on', and a red box around 'Open different' with a callout 'If you want to start with a specific version, select Open a different budget instead'.

2. In the **Select a unit** panel of the box that displays, select the department or unit you want to budget (use the drop-down menu or click the 'Select unit' button to view the list of options).

The screenshot shows the 'Select a unit' and 'Select a version' panels. The 'Select a unit' panel has a dropdown menu showing '30 0 4011: Admissions' and a 'Select unit...' button. The 'Select a version' panel shows a table of versions for the unit 'Admissions'.

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments	Edit	View	Erase	Copy	History
FY2018-D-65	2018 Training		2018 Training										
FY2017-R-50	2017 Actual	AD	2017 Actual										History
FY2017-R-62	2017 Revised Budget	AD	2017 Revised Budget										History
FY2017-R-49	2017 Budget	AD	2017 Budget										History
FY2016-R-43	2016 Actual	AD	2016 Actual										History
FY2016-R-44	2016 Revised Budget	AD	2016 Revised Budget										History
FY2016-R-42	2016 Budget	AD	2016 Budget										History
FY2015-R-38	2015 Actual	AD	2015 Actual										History

3. In the **Select a Version** panel, click **Edit** in the working version row (please contact BudgetPak Administrator to find out the current working version).

**Select a version**

Here are the different versions you can view and work with for unit 'Admissions':

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments	
FY2018-O-65	2018 Training		2018 Training	🟡					<b>Edit</b>
FY2017-R-50	2017 Actual	AD	2017 Actual						View Erase Copy History
FY2017-R-62	2017 Revised Budget	AD	2017 Revised Budget						View History
FY2017-R-49	2017 Budget	AD	2017 Budget						View History
FY2016-R-43	2016 Actual	AD	2016 Actual						View History
FY2016-R-44	2016 Revised Budget	AD	2016 Revised Budget						View History
FY2016-R-42	2016 Budget	AD	2016 Budget						View History
FY2015-R-38	2015 Actual	AD	2015 Actual						View History

4. This brings you to the **Navigation Window** for the unit.

Budget status indicates that budgeting process is "Started"

Stack

Navigation ActionPaks What if...? View/edit drivers Across the board (all line items) Monthly spreading (all line items) Notes Files

**Currently viewing**

Company: L&C Operating  
Unit: 40 0 5301: Busines  
Version: 2018 Prelim Budget  
Your budget's status is: 🟡 Started

**Headcount/FTE**

As of 5/31/2016: 15.01  
Additions: -  
Reductions: -  
As of 5/31/2018: 15.01

**Version comparison**

Expense line items

This unit: Business Office  
Total: Your difference: \$347,389

**Version comparison box**

**Your budget:** 🟡 You are here Reviewed

**Stack**

- Headcount & Salaries
  - Headcount Review
  - ✓ New Hires
  - Salary Increases
  - Taxes & Benefits
  - Salaries & Wages
  - Monthly Spreading
- Student Labor
  - Across the Board
  - Student Labor
  - Spreading
- Revenue
  - Across the Board
  - Endowment Income
  - Gifts
  - Other Income
  - Spreading
- Operating Expenses
  - Across the Board
  - Supplies
  - Equip under \$10,000
  - Printing, Publications, Advertising
  - Professional Services
  - Entertainment
- Depreciation & Interest
  - Across the Board
  - Interest Expense
  - Spreading
- Transfers
  - Across the Board
  - Dept Transfers
  - Spreading

Section

NOTE: In BudgetPak each column in the Navigation Window is called a "stack," and each box is called a "section." Sections may contain multiple accounts. If at any time you wish to return to this window, click Navigation at the top left of the window. As you work through the budget process, green check marks will appear in sections that you have reviewed and updated. Once all sections have been checked, BudgetPak will allow you to sign off on the budget. The following instructions walk you through the process of reviewing and updating the stacks and sections.

## Using the Budget Navigation Page to enter Annual Budget Amount

There are three methods to review and update accounts for the non-headcount related stacks:

**Method 1:** Across the Board (for all accounts in the stack at once);

**Method 2:** Review each section and account individually

**Method 3:** Use the Monthly spreading to both enter and spread budgets

**METHOD 1:** Across the Board (ATB) Changes – Ability to change all accounts in a stack.

To make changes **Across the Board**, click the **Across the Board** section at the top of the stack; the **Make across-the-board changes** window displays.

### Make across-the-board changes to Operating Expenses

Instead of stepping through each line item in Across the Board one at a time, you may make changes to all line items at once.

Note that some line items are government-mandated or are predetermined by corporate headquarters. You may change discretionary line items only.

Back Discard Close Save Next  
Skip this page if you've changed your mind, and want to be guided through these line items one at a time. Skip

#### Step 1

How would you like to make across-the-board changes?

- ☐ Budget a percent increase / decrease  
☐ Budget a total \$ increase / decrease  
☐ Budget by \$ per head

Your budgeted headcount as of 5/31/2018 is 19.51

#### Line items

Operating Expenses line items:

Recalc

Show/hide columns...

Line item	2017 Budget	% Increase	\$ increase	\$ per head	2018 Prelim Budget
Prof Svc-Photography	\$0	0.00 %	\$0	\$0	\$0
<b>Non-discretionary total</b>	<b>\$0</b>	<b>0.00 %</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Supplies-Office	\$5,000	0.00 %	\$0	\$308	\$6,000
Software Expense	\$50,400	0.00 %	\$0	\$2,583	\$50,400
Other Supplies	\$0	0.00 %	\$0	\$0	\$0
Equip under \$10,000	\$1,000	0.00 %	\$0	\$51	\$1,000
Printing Off-Campus	\$157,000	0.00 %	\$0	\$8,046	\$157,000
Promotional Mats	\$220,000	0.00 %	\$0	\$11,275	\$220,000
Advertising	\$0	0.00 %	\$0	\$0	\$0
Prof Svc-Companies	\$62,000	0.00 %	\$0	\$3,178	\$62,000
Merchant Charges	\$20,000	0.00 %	\$0	\$1,025	\$20,000
Legal Services	\$0	0.00 %	\$0	\$0	\$0

- i. Step 1 of the Make across-the-board changes window, select the option you would like to use.
  - a) **Budget a percent increase/decrease** will apply the specified percentage to each line item shown in the Line items box on the right side of the window.
  - b) **Budget a total \$ increase/decrease** will allocate the specified dollar amount to each line item so the total increase/decrease in the stack is the specified dollar amount.
  - c) **Budget by \$ per head** will allocate the specified dollar amount per head to each line item so the total dollar amount per head in the stack is the specified dollar amount per head. NOTE: The Budget by \$ per head is not recommended by the Finance Office.

- ii. When you select a method in **Step 1**, the **Step 2** box will appear. In the **Step 2** box, select the option you would like to use to apply the across the board change.

## Make across-the-board changes to Operating Expenses

Instead of stepping through each line item in Across the Board one at a time, you may make changes to all line items at once.

Note that some line items are government-mandated or are predetermined by corporate headquarters. You may change discretionary line items only.

Back Discard Close Save Next  
Skip this page if you've changed your mind, and want to be guided through these line items one at a time. Skip

You have unsaved changes!

**Step 1**

How would you like to make across-the-board changes?

☒ Budget a percent increase / decrease

☐ Budget a total \$ increase / decrease

☐ Budget by \$ per head

Your budgeted headcount as of 5/31/2018 is 19.51

**Step 2**

How would you like to handle percent changes?

☐ Change every discretionary line item by the same percent

☐ Change every discretionary line item (EXCEPT SOME) by the same percentage

☐ Change line items individually

**Line items**

Operating Expenses line items: Recalc Show/hide columns...

Line item	2017 Budget	% Increase	\$ increase	\$ per head	2018 Prelim Budget
Prof Svc-Photography	\$0	0.00 %	\$0	\$0	\$0
<b>Non-discretionary total</b>	<b>\$0</b>	<b>0.00 %</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Supplies-Office	\$6,000	0.00 %	\$0	\$308	\$6,000
Software Expense	\$50,400	0.00 %	\$0	\$2,583	\$50,400
Other Supplies	\$0	0.00 %	\$0	\$0	\$0
Equip under \$10,000	\$1,000	0.00 %	\$0	\$51	\$1,000
Printing Off-Campus	\$157,000	0.00 %	\$0	\$8,046	\$157,000
Promotional Mats	\$220,000	0.00 %	\$0	\$11,275	\$220,000
Advertising	\$0	0.00 %	\$0	\$0	\$0
Prof Svc-Companies	\$62,000	0.00 %	\$0	\$3,178	\$62,000
Merchant Charges	\$20,000	0.00 %	\$0	\$1,025	\$20,000
Legal Services	\$0	0.00 %	\$0	\$0	\$0
Prof Svc-Individuals	\$20,000	0.00 %	\$0	\$1,025	\$20,000
Entertainment Genl	\$40,000	0.00 %	\$0	\$2,050	\$40,000
Prizes Gifts and Awards	\$400	0.00 %	\$0	\$21	\$400

- iii. If you selected **Budget a percent increase/decrease** in Step 1
- a) **Change every discretionary line item by the same percent** will allow you to enter a percentage to increase or decrease all line items.

**Step 1**

How would you like to make across-the-board changes?

☒ Budget a percent increase / decrease

☐ Budget a total \$ increase / decrease

☐ Budget by \$ per head

Your budgeted headcount as of 5/31/2018 is 19.51

**Step 2**

How would you like to handle percent changes?

☒ Change every discretionary line item by the same percent 0.00 %

☐ Change every discretionary line item (EXCEPT SOME) by the same percentage

☐ Change line items individually

**Line items**

Operating Expenses line items: Recalc Show/hide columns...

Line item	2017 Budget	% Increase	\$ increase	\$ per head	2018 Prelim Budget
Prof Svc-Photography	\$0	0.00 %	\$0	\$0	\$0
<b>Non-discretionary total</b>	<b>\$0</b>	<b>0.00 %</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
Supplies-Office	\$6,000	0.00 %	\$0	\$308	\$6,000
Software Expense	\$50,400	0.00 %	\$0	\$2,583	\$50,400
Other Supplies	\$0	0.00 %	\$0	\$0	\$0
Equip under \$10,000	\$1,000	0.00 %	\$0	\$51	\$1,000
Printing Off-Campus	\$157,000	0.00 %	\$0	\$8,046	\$157,000
Promotional Mats	\$220,000	0.00 %	\$0	\$11,275	\$220,000
Advertising	\$0	0.00 %	\$0	\$0	\$0
Prof Svc-Companies	\$62,000	0.00 %	\$0	\$3,178	\$62,000
Merchant Charges	\$20,000	0.00 %	\$0	\$1,025	\$20,000
Legal Services	\$0	0.00 %	\$0	\$0	\$0
Prof Svc-Individuals	\$20,000	0.00 %	\$0	\$1,025	\$20,000
Entertainment Genl	\$40,000	0.00 %	\$0	\$2,050	\$40,000
Prizes Gifts and Awards	\$400	0.00 %	\$0	\$21	\$400

- b) **Change every discretionary line item (EXCEPT SOME) by the same percentage** will allow you to check/uncheck line items in the Apply standard

increase column and enter a percentage to increase or decrease the selected line items. The percentage entered will only be applied to the checked line items.

**Step 1**

How would you like to make across-the-board changes?

- ☒ Budget a percent increase / decrease
- ☐ Budget a total \$ increase / decrease
- ☐ Budget by \$ per head

Your budgeted headcount as of 5/31/2018 is 15.01

**Line items**

Operating Expenses line items: Recalc Show/hide columns...

Line Item	2016 Budget	Apply std increase	% Increase	\$ Increase	\$ per head	2018 Prelim Budget
Software Expense	\$0	<input checked="" type="checkbox"/>	0.00 %	\$0	\$0	\$0
Other Supplies	\$0	<input checked="" type="checkbox"/>	0.00 %	\$0	\$0	\$0
Equip under \$10,000	\$2,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$133	\$2,000
Printing On-Campus	\$0	<input checked="" type="checkbox"/>	0.00 %	\$0	\$0	\$0
Printing Off-Campus	\$1,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$67	\$1,000
Advertising	\$0	<input checked="" type="checkbox"/>	0.00 %	\$0	\$0	\$0
Prof Svc-Companies	\$30,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$1,999	\$30,000
Merchant Charges	\$4,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$266	\$4,000
Bank Service Fees	\$35,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$2,332	\$35,000
Audit Services	\$120,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$7,995	\$120,000
Entertainment Genl	\$3,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$200	\$3,000
Prizes Gifts and Awards	\$0	<input checked="" type="checkbox"/>	0.00 %	\$0	\$0	\$0
Transportation Exp	\$0	<input checked="" type="checkbox"/>	0.00 %	\$0	\$0	\$0
Meals & Lodging Exp	\$3,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$200	\$3,000
Travel-Conferences	\$5,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$333	\$5,000
Meetings & Registrtn	\$5,000	<input checked="" type="checkbox"/>	0.00 %	\$0	\$333	\$5,000

- c) **Change line items individually** will allow you to manually enter a percent increase/decrease in the % increase column for each line item. To enter a percent increase/decrease, double click the % increase box for the line item and type in the desired percentage.

**Step 1**

How would you like to make across-the-board changes?

- ☒ Budget a percent increase / decrease
- ☐ Budget a total \$ increase / decrease
- ☐ Budget by \$ per head

Your budgeted headcount as of 5/31/2018 is 15.01

**Line items**

Operating Expenses line items: Recalc Show/hide columns...

Line Item	2016 Budget	% Increase	\$ Increase	\$ per head	2018 Prelim Budget
Software Expense	\$0	0.00 %	\$0	\$0	\$0
Other Supplies	\$0	0.00 %	\$0	\$0	\$0
Equip under \$10,000	\$2,000	0.00 %	\$0	\$133	\$2,000
Printing On-Campus	\$0	0.00 %	\$0	\$0	\$0
Printing Off-Campus	\$1,000	0.00 %	\$0	\$67	\$1,000
Advertising	\$0	0.00 %	\$0	\$0	\$0
Prof Svc-Companies	\$30,000	0.00 %	\$0	\$1,999	\$30,000
Merchant Charges	\$4,000	0.00 %	\$0	\$266	\$4,000
Bank Service Fees	\$35,000	0.00 %	\$0	\$2,332	\$35,000
Audit Services	\$120,000	0.00 %	\$0	\$7,995	\$120,000
Entertainment Genl	\$3,000	0.00 %	\$0	\$200	\$3,000
Prizes Gifts and Awards	\$0	0.00 %	\$0	\$0	\$0
Transportation Exp	\$0	0.00 %	\$0	\$0	\$0
Meals & Lodging Exp	\$3,000	0.00 %	\$0	\$200	\$3,000
Travel-Conferences	\$5,000	0.00 %	\$0	\$333	\$5,000
Meetings & Registrtn	\$5,000	0.00 %	\$0	\$333	\$5,000

White cells are editable. To enter a decrease, enter the percentage or dollar amount with a minus sign (i.e. -5.00% or -\$500). To apply manual changes made in the Line items table, click the **Recalc** button at the top right of the table. If at any point you need to clear the changes made in **Across the Board**, click the **Discard** button.

The Version Comparison box will show both the total budget and variances for the stack you are viewing as well as the total budget for the unit.

Navigation	ActionPaks	What if...?	View/edit drivers	Across the board (all line items)	Monthly spreading (all line items)	Notes	Files																					
<b>Currently viewing</b> Company: L&C Operating Unit: 30 0 4011: Admissio Version: 2018 Prelim Budget Your budget's status is: Started				<b>Headcount/FTE</b> As of 6/1/2017: 19.51 Additions: - Reductions: - As of 5/31/2018: 19.51				<b>Version comparison</b> Expense line items This stack: Operating Expenses This unit: Admissions <table border="1"> <thead> <tr> <th>Total:</th> <th>Your difference:</th> <th>Total:</th> <th>Your difference:</th> </tr> </thead> <tbody> <tr> <td>2015 Actual:</td> <td></td> <td>2015 Actual:</td> <td></td> </tr> <tr> <td>2016 Actual:</td> <td></td> <td>2016 Actual:</td> <td></td> </tr> <tr> <td>2017 Budget:</td> <td></td> <td>2017 Budget:</td> <td></td> </tr> <tr> <td>2018 Prelim Budget:</td> <td></td> <td>2018 Prelim Budget:</td> <td></td> </tr> </tbody> </table>	Total:	Your difference:	Total:	Your difference:	2015 Actual:		2015 Actual:		2016 Actual:		2016 Actual:		2017 Budget:		2017 Budget:		2018 Prelim Budget:		2018 Prelim Budget:	
Total:	Your difference:	Total:	Your difference:																									
2015 Actual:		2015 Actual:																										
2016 Actual:		2016 Actual:																										
2017 Budget:		2017 Budget:																										
2018 Prelim Budget:		2018 Prelim Budget:																										

- iv. Click **Save**. Click **Close** to return to the Navigation window and select the next stack you wish to review/edit.
- v. When you have reviewed all sections, you can go up to Action, and selected “Mark all as reviewed”.

<b>Actions</b>	Go to section...
----------------	------------------

## METHOD 2: Review each section and account individually

- i. To view and make changes to each account individually, click any section you want to budget. The Account window displays. Some sections *may* contain multiple accounts. For example, the Supplies section may contain accounts 6000 and 6075. Each account appears as a separate tab.
- ii. In Step 1 of the Annual total for [account name] window, an annual amount based on last year's budget is displayed. You can either accept this amount or use one of the other methods (**by annual amount, by percent increase, by per head, by line item detail, by driver x rate, by advanced modeler**) to change the annual amount. Note: Advanced modeler method is not recommended at this time.
- iii. In Step 2, enter any relevant comments about the account and its annual budget amount in the text box provided.
- iv. Repeat ii and iii for each line item of the section.
- v. Click **Save**. Selecting **Close** will return you to the Budget Navigation Window. **Next** will move you to the next section in the stack.
- vi. When you have reviewed all sections, you can go up to Action, and selected “Mark all as reviewed”.

<b>Actions</b>	Go to section...
----------------	------------------

## Supplies

This section consists of 3 line items. To budget these line items, proceed through each step, one at a time. On each step you will budget a separate line item.

Back Discard Close Save Next

Line item 1 of 3

Line item 2 of 3

Line item 3 of 3

Step 1

Supplies-Office

6000

Please select one of the budget methods below and use it to designate the annual amount for this line item.

Select budget methods from here:

By annual amount

By percent increase

By per head

By line item detail

By driver x rate

By rows and columns

By annual amount

Enter annual amount here:

\$10,000

By percent increase

2017 Budget annual amount:

\$10,000

Enter your percent increase/decrease:

0.00 %

\$0

2018 Prelim Budget annual amount:

\$10,000

By annual amount per head

As of 5/31/2018

15.01

Your budgeted headcount:

\$666.22

Enter your annual amount per head here:

\$10,000

This year's annual amount:

\$10,000

Last year's annual amount was \$10,000. With the current headcount, this would be \$666 per head.

Step 2 (optional)

Would you like to make a note about this line item? If so, enter your note here. It will be printed on some reports. You may enter up to 1023 characters.

Edit Import notes from prior budgets

Category

Category code

Category description

Click 'Select' to choose categories

Select

Summary

This is a summary of the line items in this section.

Section total:

\$10,000

Line item	Amount
1 Supplies-Office	\$10,000
2 Software Expense	\$0

### METHOD 3: Using the Spreading Method for Budget Entry

BudgetPak spreads expenses throughout the year according to how expenses were incurred in prior years. This can be shown by clicking on the **Spreading** section at the bottom of each stack on the Budget Navigation page. You can also use this screen to change or input the budget.

Headcount & Salaries	Student Labor	Revenue	Operating Expenses	Depreciation & Interest	Transfers
Headcount Review	✓ Across the Board	✓ Across the Board	✓ Across the Board	✓ Across the Board	✓ Across the Board
New Hires	✓ Student Labor \$10,000	✓ Endowment Income \$0	✓ Supplies \$10,000	✓ Interest Expense \$45,000	✓ Dept Transfers (\$25,000)
✓ Salary Increases	✓ Spreading	✓ Gifts \$0	✓ Equip under \$10,000 \$2,000	✓ Spreading	✓ Spreading
✓ Taxes & Benefits \$27,699		✓ Other Income \$170,000	✓ Printing, Publications, Advertising \$1,000		
✓ Salaries & Wages \$323,600		✓ Spreading	✓ Professional Services \$183,000		
✓ Monthly Spreading			✓ Entertainment \$2,000		
			✓ Travel & Prof Meetings \$19,000		
			✓ Other Operating Exp \$1,000		
			✓ Lit & Subscriptions \$1,000		
			✓ Dues & Memberships \$2,000		
			✓ Equipment Mntnc & Repair \$500		
			✓ Software Maintenance \$75,000		
			✓ Postage \$9,000		
			✓ Telecommunications \$500		
			✓ Intra-Inst Expense \$3,500		
			✓ Spreading ⓘ		

- i) If you would like to spread all the line items the same way:
- (1) In **Step 1** of the spreading page that displays, accept the default, **Spread all line items the same way**.
  - (2) In Step 2, accept the default, **based on FY2016 Actual monthly amounts**. Selecting this option will distribute each monthly amount according to the seasonality reflected in the noted version.
    - (a) If you click on the grid and hover on a cell, the reference data for the line item and month will be displayed.

## Monthly spreading

The amounts you have entered so far for Operating Expenses are for the full fiscal year. Here you can estimate (or precisely specify) how they are incurred month-by-month. Note: You'll only be able to spread line items under your discretion. The month-to-month cost distribution of non-discretionary line items is determined by calculations or other external factors.

← Back Discard X Close Save → Next

You have unsaved changes!

### Step 1

How would you like to spread your annual amounts on a monthly basis?

- ☒ Spread all line items the same way  
☐ Choose different spreading line by line

### Step 2

How would you like to spread the annual amounts?

- ☒ Based on 2016 Actual monthly amounts  
☐ Spread evenly throughout the year  
☐ Spread based on the number of days in a month  
☐ Do not do automated spreading

### Line items

Monthly spreading for Operating Expenses line items:

Recalc

Show/hide columns...

Actions...

Line Item	Type of automatic spreading	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Total
Supplies-Office	As last year	\$1,066	\$294	\$267	\$1,343	\$1,179	\$456	\$885	\$718	\$1,268	\$779	\$511	\$1,234	\$10,000
Software Expense	As last year	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Supplies	As last year	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Equip under \$10,000	As last year	\$0	\$0	\$0	\$0	\$0	\$383	\$0	\$0	\$0	\$284	\$0	\$1,333	\$2,000
Printing On-Campus	As last year	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Printing Off-Campus	As last year	\$40	\$0	\$0	\$40	\$192	\$0	\$0	\$217	\$308	\$109	\$94	\$0	\$1,000
Advertising	Evenly	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Prof Svc-Companies	As last year	\$898	\$2,798	\$7,796	\$0	(\$992)	\$879	\$891	\$1,728	\$15	\$4,187	\$37	\$1,763	\$20,000
Merchant Charges	As last year	\$2,925	\$182	\$344	\$159	\$340	\$137	\$626	\$539	\$1,500	\$233	\$414	\$600	\$8,000
Bank Service Fees	Evenly	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$35,000
Audit Services	As last year	\$0	\$3,411	\$40,448	\$56,846	\$0	\$5,739	\$0	\$7,543	\$0	\$0	\$0	\$6,013	\$120,000
Entertainment Genl	As last year	\$0	\$56	\$12	\$18	\$315	\$292	\$69	\$137	\$805	\$103	\$61	\$130	\$2,000
Prizes Gifts and Awards	As last year	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Transportation Exp	As last year	\$11	\$0	\$0	\$19	\$1,157	\$1,245	\$0	\$0	\$1,317	\$0	\$251	\$0	\$4,000
Meals & Lodging Exp	As last year	\$0	\$546	\$39	\$360	\$746	\$0	\$230	\$0	\$64	\$0	\$0	\$14	\$2,000

- (b) You may change the total, and the monthly amounts will be re-spread. You may also override automated spreading for particular months by directly entering a value for the month; this forces the month to have that value. The background color turns to yellow for overrides.

- (c) When you are finished editing a cell, click **Recalc** button to update it.

## Monthly spreading

The amounts you have entered so far for Operating Expenses are for the full fiscal year. Here you can estimate (or precisely specify) how they are incurred month-by-month. Note: You'll only be able to spread line items under your discretion. The month-to-month cost distribution of non-discretionary line items is determined by calculations or other external factors.

← Back Discard X Close Save → Next

You have unsaved changes!

### Step 1

How would you like to spread your annual amounts on a monthly basis?

- ☐ Spread all line items the same way  
☐ Choose different spreading line by line

### Overrides

You may **OVERRIDE** the automatic spreading for particular months by typing in a value.

You may erase overrides with these buttons.

Erase this override

Erase ALL overrides

### Line items

Monthly spreading for Operating Expenses line items:

Recalc

Show/hide columns...

Actions...

Line Item	Type of automatic spreading	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Total
Supplies-Office	As last year	\$1,066	\$294	\$267	\$1,343	\$1,179	\$456	\$885	\$718	\$1,268	\$779	\$511	\$1,234	\$10,000
Software Expense	As last year	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other Supplies	As last year	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Equip under \$10,000	As last year	\$0	\$0	\$0	\$0	\$0	\$861	\$0	\$0	\$0	\$639	\$0	\$1,000	\$2,500
Printing On-Campus	Evenly	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Printing Off-Campus	As last year	\$40	\$0	\$0	\$40	\$192	\$0	\$0	\$217	\$308	\$109	\$94	\$0	\$1,000
Advertising	Evenly	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Prof Svc-Companies	As last year	\$898	\$2,798	\$7,796	\$0	(\$992)	\$879	\$891	\$1,728	\$15	\$4,187	\$37	\$1,763	\$20,000
Merchant Charges	As last year	\$2,925	\$182	\$344	\$159	\$340	\$137	\$626	\$539	\$1,500	\$233	\$414	\$600	\$8,000
Bank Service Fees	Evenly	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$2,917	\$35,000
Audit Services	As last year	\$0	\$3,411	\$40,448	\$56,846	\$0	\$5,739	\$0	\$7,543	\$0	\$0	\$0	\$6,013	\$120,000
Entertainment Genl	As last year	\$0	\$56	\$12	\$18	\$315	\$292	\$69	\$137	\$805	\$103	\$61	\$130	\$2,000
Prizes Gifts and Awards	As last year	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

- Once you have completed all the necessary steps, all sections will have a green check mark to indicate that a budget amount has been entered and reviewed. A **Budget Completed** pop up box will appear and the budget status will change to “Complete” with a green circle. From here you can select **Continue working** if you would like to enter **ActionPaks** or review an area, select **Print reports** if you would like to view reports for your budget, or **Close** if you are done with the budget.

The screenshot displays the BudgetPak interface. On the left, a red box highlights the text "Budget Status shows Complete". In the main interface, the "Your budget's status is:" field shows a green circle and the word "Complete". A pop-up box titled "End of budget" is centered on the screen, displaying a green checkmark and the text "Budget completed! Congratulations! Your budget has been completely reviewed." Below this, it asks "What would you like to do next?" and provides three options: "Continue working", "Print reports", and "Sign off" (which is selected with a checkmark). A note at the bottom of the pop-up states: "NOTE: Once your budget has been signed off, you may not make any more changes to it (unless your manager revokes your signoff)." The background interface shows various budget sections like "Headcount & Salaries", "Student Learning", "Depreciation & Interest", and "Transfers", each with a green checkmark indicating completion.

If you are finishing your budget and do not need to budget for specific projects, you can skip the ActionPaks – Budgeting for Specific Projects section and directly go to **Completing and Signing-off on your Budget** section. Or, **Viewing Budget Reports** section.

## Viewing Budget Reports

1. You can access the reporting menu either from the Budget Completed box by clicking **Print reports** or by clicking **Reports** in the top bar of the screen.

The screenshot shows the BudgetPak software interface. At the top, the navigation bar includes 'Home', 'Versions', 'Status', 'Reports' (highlighted with a red box), 'Configuration', and 'About'. Below this, a secondary bar contains 'Navigation', 'ActionPaks', 'What if...?', 'View/edit drivers', 'Across the board (all line items)', 'Monthly spreading (all line items)', 'Notes', and 'Files (0/1)'. The main content area displays 'Currently viewing' information for 'L&C Operating' with unit '40 0 5301: Business' and version '2018 Prelim Budget'. It also shows 'Headcount/FTE' and 'Version comparison' data. A modal window titled 'End of budget' is open, showing a green checkmark and the text 'Budget completed! Congratulations! Your budget has been completely reviewed.' It asks 'What would you like to do next?' and provides three options: 'Continue working', 'Print reports' (highlighted with a red box), and 'Sign off'. A note at the bottom of the modal states: 'NOTE: Once your budget has been signed off, you may not make any more changes to it (unless your manager revokes your signoff).' The background shows a list of budget categories with checkmarks, including 'Headcount & Salaries', 'Student', 'Depreciation & Interest', and 'Transfers'.

2. Standard Reports and Advanced Reports
  - a. There are three standard BudgetPak reports: Click **View** to see the reports on the last version and unit you were working on
    - i. Budget Summary: Click to run a P&L report, broken out by standard subtotals.
    - ii. My budget versus...: Click to run a summary P&L report comparing to different versions.
    - iii. My budget decisions: to run a detailed report listing the decision that went into the budget.

Select a report to preview:

Unit: 40 0 5301: Business Office  
Version: 2018 Prelim Budget 2

**My budget summary**

Run a summary P&L report of 'Business Office', version '2018 Prelim Budget 2'

[View](#)

**My budget versus...**

Run a summary P&L report for 'Business Office', comparing version '2018 Prelim Budget 2' against...

[...propose budget \(version '2018 Prelim Budget'\)](#) [View](#)

[...current year budget \(version '2017 Budget'\)](#) [View](#)

[...current year actual \(version '2017 Actual'\)](#) [View](#)

[...prior year actual \(version '2016 Actual'\)](#) [View](#)

**My budget decisions**

Run a detailed report listing the decisions that went into the budget for 'Business Office', version '2018 Prelim Budget 2'

[View](#)

Or make different report selections:

**Advanced reporting**

Select a different report, or choose different ways to see the above reports.

[View](#)

**Saved report selections**

Run one of my saved reports.

[View](#)

b. Running a report from the Advanced Reporting page

- i. Step 1: select the type of report you want to run. There are two major categories separated by two tabs: P&L reports, and other reports.
  1. P&L Report: you select the date range for the report: Annual, Quarterly, Year-to-date, or Monthly. Lewis & Clark budgets on an annual basis. For this reason Quarterly, Year-to-Date, and Monthly reports can be easily misinterpreted and are not recommended. Please consult your BudgetPak administrator before running these reports.
  2. Then you select how the accounts should be grouped.
    - a. By standard subtotals: It will group the accounts by standard P&L subtotals established by the administrator.

- b. By section: it will group the accounts on the report in the same way that they are grouped by the sections on the budget navigation map (including ActionPaks if any).
- c. ActionPaks only: it will group the accounts on the report by the ActionPaks . Only ActionPaks will be included on the report; non-ActionPak sections are excluded automatically

#### Advanced reporting

Select a report and detailed options for it. You may also retrieve previously-saved selections.

Close

Step 1: Select a report

P&L reports: Other reports:

Select the date range:

☒ Annual  
☐ Quarterly  
☐ Year-to-date  
☐ Monthly

Group accounts by:

☒ By standard subtotals  
☐ By section  
☐ ActionPaks only

Step 2: Select the version(s)

Report on which version? 2018 Prelim Budget

Compare against which version?

☒ None  
☐ This version: 2017 Budget

Step 3: Select units

The currently-selected units are listed below. Click 'Change unit selections' to select from a list of all units available to you.

Change unit selections 2 units selected.

Unit code	Description
CAS IA	CAS Institutional Advancement
COM IA	COM Institutional Advancement

Step 4: Select report options

Show accounts or subtotals?

☐ Display detail and subtotals  
☒ Display summary subtotals only

What level of detail?

☒ Standard report detail only  
☐ Include extended detail on report  
 (Files, categories, drivers, line item details)

Which chart of accounts?

☒ Local company chart of accounts  
☐ Enterprise chart of accounts

Include account notes? ☒ Yes ☐ No

Step 5: Select currency options

Report in which currency? USD (\$)

Step 6: View report

View the report

Report will appear in a new tab, or a new browser window (depending on how your browser is configured).

NOTE: This report should be printed in landscape mode.

You may save your report selections (or retrieve a previously saved selection):

Run one of my saved reports

Save current selections as new saved report

Update saved report with current selections

- ii. Step 2, select the version you want to report on. You may optionally choose a variance version
- iii. Step 3, select the unit. Within this step the list of units displayed is enabled only if unit selection is relevant to the particular report currently selected.
- iv. Step 4, select additional report option. You can choose whether to show subtotals only on the report, or show account detail as well.
- v. Step 6, select preview the report. Click preview the report in a new browser tab, or a new browser window.

### 3. A tour of the Report Preview page

- a. Flip through the different pages of the report with forward/back buttons
- b. Report can be downloaded to a **PDF file** or export to **Excel** or **Excel (Data only)**
  - i. Send to Excel: formulas are not exported, just values
  - ii. Send to Excel (data only): download the raw report data, unformatted, to Excel. This is useful if you want to explore the data further with pivot tables, etc.

Send to PDF
Send to Excel
Send to Excel (data only)

Send to Excel (data only): For advanced users. Not available for all reports. May include blank columns that are not used with current report selections.

1 of 1
Find | Next

### P&L Annual Report

**Version:** 2018 Prelim Budget 2

**Company:** L&C Operating

**Unit:** 40 0 5301: Business Office

**Budget holder:** Unassigned

Account	Description	2018 Prelim Budget 2	Notes for 2018 Prelim Budget 2
4350	Unrestricted Gifts	\$0	
	<b>Annual Gifts</b>	<b>\$0</b>	
4400	Endowment Inc-Genl	\$0	
	<b>Endowment Income</b>	<b>\$0</b>	
4691	Intra-Inst Income	\$0	
	<b>Intra-Inst Income</b>	<b>\$0</b>	
4550	Int-ST Investments	\$0	
	<b>Investment Income</b>	<b>\$0</b>	
4690	Misc. Income	\$170,000	
4695	Dishonored Check Chg	\$0	
	<b>Other Income</b>	<b>\$170,000</b>	
	<b>TOTAL INCOME</b>	<b>\$170,000</b>	
5100	Administrative Staff Salaries	\$180,000	
5101	Non-Base Other	\$0	
5199	Admin Accrual	\$0	
	<b>Administrative Salaries</b>	<b>\$180,000</b>	
5250	Clerical Wages - LCSSA	\$123,600	
5255	Temporary Labor	\$20,000	
5299	Hourly Staff wage accrual	\$0	
5375	Overtime	\$0	
	<b>Support Wages</b>	<b>\$143,600</b>	
5510	FICA Expense - Calculated	\$24,755	
5520	Workers Comp Expense	\$647	
5530	Unemployment Expense	\$474	
5540	Other Payroll Tax	\$0	
BPCFICA	FICA Other Calculated	\$0	
BPCSU	SU Other Calculated	\$0	
	<b>Payroll Taxes</b>	<b>\$25,877</b>	

4. You have the capability to save and re-run your report selection.

Advanced reporting

Select a report and detailed options for it. You may also retrieve previously-saved selections.

Close

**Step 1: Select a report**

P&L reports: Other reports:

Select the date range:

☒ Annual  
☐ Quarterly  
☐ Year-to-date  
☐ Monthly

Group accounts by:

☒ By standard subtotals  
☐ By section  
☐ ActionPaks only

**Step 2: Select the version(s)**

Report on which version? 2018 Prelim Budget 2

Compare against which version?

☒ None  
☐ This version: 2016 Actual

**Step 3: Select units**

The currently-selected units are listed below. Click 'Change unit selections' to select from a list of all units available to you.

Change unit selections 1 unit selected.

Unit code	Description
40 0 5301	Business Office

**Step 4: Select report options**

Show accounts or subtotals?

☒ Display detail and subtotals  
☐ Display summary subtotals only

What level of detail?

☒ Standard report detail only  
☐ Include extended detail on report  
 (Files, categories, drivers, line item details)

Which chart of accounts?

☒ Local company chart of accounts  
☐ Enterprise chart of accounts

Include account notes? ☒ Yes ☐ No

**Step 5: Select currency options**

Report in which currency? USD (\$)

**Step 6: View report**

View the report

Report will appear in a new tab, or a new browser window (depending on how your browser is configured).

NOTE: This report should be printed in landscape mode.

You may save your report selections (or retrieve a previously saved selection):

## Completing and Signing-off on your Budget

In order to complete your budget, each stack/account must be reviewed. Green check marks indicate a section has been reviewed. When all sections contain a green checkmark, the budget is complete and can be “signed off.” Follow these instructions to sign off on your budget. On the toolbar at the top of the window, click **Versions**. The Version Selection window displays.

1. In the **Select a Unit** panel, select the department you want to submit for approval.
2. You will see a sign-off button in the green highlighted row.

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments	
FY2018-O-59	2018 Prelim Budget 2		2018 Prelim Budget 2			7/8/2016 2:00 PM	XI		Edit View Erase Copy History
FY2018-O-52	2018 Prelim Budget		2018 Final Budget		<b>Sign off</b>	6/30/2016 6:09 PM	XI		Edit View Erase Copy History
FY2018-O-51	2018 Baseline Budget	B	2018 Baseline Budget						View Erase Copy History

- a. Click the **Sign-off** button;
  - b. Click **Yes** to confirm you want to sign-off on the budget. The budget is now signed-off and ready to be approved by Approval Managers. Once a budget is signed-off, you can no longer make any changes to it, unless your Approval Manager re-opens that budget for you.
3. Your budget is now complete and you may log out of BudgetPak.

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments	
FY2018-O-59	2018 Prelim Budget 2		2018 Prelim Budget 2			7/8/2016 2:00 PM	XI		Edit View Erase Copy History
FY2018-O-52	2018 Prelim Budget		2018 Final Budget		<input checked="" type="checkbox"/>	6/30/2016 6:09 PM	XI		View Erase Copy History
FY2018-O-51	2018 Baseline Budget	B	2018 Baseline Budget						View Erase Copy History

NOTE: For each department for which you are responsible for submitting a budget, all of the steps in all of the sections above must be completed.

## Appendix 1 - Notes and Files

The notes page is where you can attach notes to an entire budget at once.

### 1. Adding a note

## Notes

Here you may read or enter notes about your budget. Depending on your user-privileges, you may edit only your notes or all notes.

User: The user who added the note. Last name, First name (username)

Unit: The unit the note was added

Last Edited: Date and time the note was last edited

Rolldown to child units: If you want this note to appear in all units that are children of this unit. This box will only be enabled when you are in a rollup (summary) unit. A note entered in a “base unit” will always appear in all units that are parents, grandparents, etc of the note’s unit.

## 2. Files

Files may be uploaded as supporting documents for budget decisions. Use the Upload button to upload files to BudgetPak’s server.

The screenshot shows the BudgetPak interface. At the top is a navigation bar with tabs: Navigation, ActionPaks, What if...?, View/edit drivers, Across the board (all line items), Monthly spreading (all line items), Notes, and Files. Below this is a 'Currently viewing' section with dropdowns for Company (L&C Operating), Unit (40 0 5301: Business), and Version (2018 Prelim Budget). To the right is a 'Headcount/FTE' section showing data for 6/1/2017 and 5/31/2018. Further right is a 'Version comparison' section with a dropdown for 'Expense line items' and a table showing budget data for 2015 Actual, 2016 Budget, and 2018 Prelim Budget. The 'Files' section is highlighted with a blue header. It contains a message about file storage space (0.00 MB out of 500 MB) and a table with columns: Filename (click to download), File size, Unit, User, Rolldown to child units, Has mappings, and Mappings. The 'Upload' button is highlighted with a red box.

Filename: List of files.

File size: BudgetPak has limited file storage so please **do not upload large data files**. File types accepted: .xlsx, .docx, .pptx, .pdf, .jpeg, etc. Click on a filename to download it.

Unit: Specific unit and version the user file was uploaded to.

User: The user who uploaded the user file. Last name, First name (Username)

Rolldown to child units: If you want this user file to appear in all units that are children of the file’s unit.

- Upload the supporting document, then click “Save”.
- If you want the file to be mapped to different accounts and/or ActionPaks, click “Mappings”
- Select the accounts for the file you wish to be mapped to.

**User file account mapping**

**Mappings for Final Checklist.pdf**

**Accounts** **ActionPaks**

- ☐ 4350 : Unrestricted Gifts
- ☐ 4400 : Endowment Inc-Genl
- ☐ 4550 : Int-ST Investments
- ☐ 4690 : Misc. Income
- ☐ 4691 : Intra-Inst Income
- ☐ 4695 : Dishonored Check Chg
- ☐ 5100 : Administrative Staff Salaries
- ☐ 5101 : Non-Base Other
- ☐ 5199 : Admin Accrual
- ☐ 5250 : Clerical Wages - LCSSA
- ☐ 5255 : Temporary Labor
- ☐ 5299 : Hourly Staff wage accrual

OK Cancel

**Files**

Here you may upload or download files from your budget. Depending on you created files.

File storage space used: 0.10 MB out of 500 MB (0 % full).

**Admin files** **User files**

**Upload**

Filename (click to download)	File size	Unit
Final Checklist.pdf	0.1 MB	40 0 5301 : Busi

**Mappings**

Mappings	Delete
<input type="checkbox"/> Mappings	Delete

## Appendix 2 - ActionPaks – Budgeting for Specific Projects

ActionPaks are an optional feature that you can use to budget for unit-specific initiatives, projects, or programs. Any amount entered into an ActionPak is **additive** to the amount already entered for that line item in your base budget. ActionPaks must have a note or attachment describing the initiative.

1. Click **ActionPaks** in the blue navigation menu at the top of your screen. ActionPaks can be entered at any point in the budget entry process detailed in the section above.

**Navigation** | **ActionPaks** | What if...? | View/edit drivers | Across the board (all line items) | Monthly spreading (all line items) | Notes | Files

**Currently viewing**  
 Company: L&C Operating  
 Unit: 40 0 5301: Business  
 Version: 2018 Prelim Budget  
 Your budget's status is: Complete

**Headcount/FTE**  
 As of 5/31/2016: 15.01  
 Additions: -  
 Reductions: -  
 As of 5/31/2018: 15.01

**Version comparison**  
 Expense line items  
 2015 Actual: -  
 2016 Budget: -  
 2018 Prelim Budget: -

**This stack: ActionPaks**  
 Total: -  
 Your difference: -

**This unit: Business Office**  
 Total: \$347,389  
 Your difference: -

**FYI**

**ActionPak configuration**  
 ActionPak budgeting allows you to develop a separate line item for an ActionPak, and then automatically merge it into your standard line item. You will need to designate which accounts make up the ActionPak.

**Add ActionPak** (highlighted)  
 ActionPak name:   
 ActionPak code:   
 Delete ActionPak  
 Rename ActionPak  
 Import ActionPaks

**Line items used in this ActionPak:**  
 These line items currently make up this ActionPak. You may add more line items from the list of available ones at right. If you've mistakenly added a line item to the ActionPak, or want to remove one for any reason, you may do so, but you will lose any currently budgeted values for it.

**Line items available for use in ActionPaks:**  
 These are the list of line items that are available to become part of this ActionPak. You may select as many line items as you wish to include in the ActionPak by clicking the 'Add line item' button.

Account number | Line item

4400	Endowment Inc-Genl
4350	Unrestricted Gifts
4550	Int-ST Investments
4691	Intra-Inst Income
4690	Misc. Income
4695	Dishonored Check Chg
5100	Admin Annual

2. Click the **Add ActionPak** button and enter a name for this ActionPak, and Click **OK**.

Navigation ActionPaks What if...? View/edit drivers Across the board (all line items) Monthly spreading (all line items) Notes Files

**Currently viewing**

Company: L&C Operating  
Unit: 40 0 5301: Business  
Version: 2018 Prelim Budget  
Your budget's status is: Complete

**Headcount/FTE**

As of 5/31/2016: 15.01  
Additions: -  
Reductions: -  
As of 5/31/2018: 15.01

**Version comparison**

Expense line items

2015 Actual: -  
2016 Budget: -  
2018 Prelim Budget: -

This stack: ActionPaks  
Total: -  
Your difference: -

This unit: Business Office  
Total: -  
Your difference: \$347,389

**FYI**

### ActionPak configuration

ActionPak budgeting allows you to develop a separate line item for an ActionPak, and then automatically merge it into your standard line item. You will need to designate which accounts make up the ActionPak.

Discard Close Save

+ Add ActionPak ActionPak name:   
Delete ActionPak ActionPak code:   
Rename ActionPak  
Import ActionPaks

**Line items used in this ActionPak:**

These line items currently make up this ActionPak. You may add more line items from the list of available ones at right. If you've mistakenly added a line item to the ActionPak, or want to remove one for any reason, you may do so, but you will lose any currently budgeted values for it.

Account number	Line item

Add or remove line items from the ActionPak:

Line items available for use in ActionPaks:

These are the list of line items that are available to become part of this ActionPak. You may select as many line items as you wish to include in the ActionPak by clicking the 'Add line item' button.

Account number	Line item
4400	Endowment Inc-Genl
4350	Unrestricted Gifts
4550	Int-ST Investments
4691	Intra-Inst Income
4690	Misc. Income
4695	Dishonored Check Chg
5199	Admin Accrual
5299	Hourly Staff wage accrual

- Enter a code for this ActionPak. The code is required and needs to be a unique identifier within the unit.

### ActionPak configuration

Discard Close Save

ActionPak budgeting allows you to develop a separate line item for an ActionPak, and then automatically merge it into your standard line item. You will need to designate which accounts make up the ActionPak.

Yellow box: You have unsaved changes!

+ Add ActionPak ActionPak name:  Example 1  
Delete ActionPak ActionPak code:   
Rename ActionPak  
Import ActionPaks

You may use these up/down buttons to change the order in which your ActionPaks appear.

**Line items used in this ActionPak:**

These line items currently make up this ActionPak. You may add more line items from the list of available ones at right. If you've mistakenly added a line item to the ActionPak, or want to remove one for any reason, you may do so, but you will lose any currently budgeted values for it.

Account number	Line item

Add or remove line items from the ActionPak:

**Line items available for use in ActionPaks:**

These are the list of line items that are available to become part of this ActionPak. You may select as many line items as you wish to include in the ActionPak by clicking the 'Add line item' button.

Account number	Line item
4400	Endowment Inc-Genl
4350	Unrestricted Gifts
4550	Int-ST Investments
4691	Intra-Inst Income
4690	Misc. Income
4695	Dishonored Check Chg
5199	Admin Accrual
5299	Hourly Staff wage accrual
5400	Student Labor FWS
5420	Student Labor Other
5450	Institutional Work Study

- Map line items (accounts) to the ActionPak by selecting the **line item in the Line items available for use in ActionPaks** box on the right of the window and clicking the left arrow

to add it to the ActionPak. The accounts selected will appear in the **Line items used in this ActionPak** box on the left of the window. Map all accounts that will be needed for the ActionPak.

### ActionPak configuration

ActionPak budgeting allows you to develop a separate line item for an ActionPak, and then automatically merge it into your standard line item. You will need to designate which accounts make up the ActionPak.

Discard Close Save  
You have unsaved changes!

Add ActionPak  
Delete ActionPak  
Rename ActionPak  
Import ActionPaks

ActionPak name: Example 1  
ActionPak code:

You may use these up/down buttons to change the order in which your ActionPaks appear.

#### Line items used in this ActionPak:

These line items currently make up this ActionPak. You may add more line items from the list of available ones at right. If you've mistakenly added a line item to the ActionPak, or want to remove one for any reason, you may do so, but you will lose any currently budgeted values for it.

Account number	Line item
5580	Advertising

Add or remove line items from the ActionPak:



#### Line items available for use in ActionPaks:

These are the list of line items that are available to become part of this ActionPak. You may select as many line items as you wish to include in the ActionPak by clicking the 'Add line item' button.

Account number	Line item
7020	Travel Conferences
7200	Meetings & Registrn
7201	Staff Training
6290	Miscellaneous
6296	Cash Over/Short
6297	Suspense
8792	Bookstore Purchases
8791	Intra-Inst Expense
8793	Intra-Inst Copy/Print
9502	Department Trfers In

- Click **Save** then click **Close** to return to the Navigation window.

### ActionPak configuration

ActionPak budgeting allows you to develop a separate line item for an ActionPak, and then automatically merge it into your standard line item. You will need to designate which accounts make up the ActionPak.

Discard Close Save  
You have unsaved changes!

Add ActionPak  
Delete ActionPak  
Rename ActionPak  
Import ActionPaks

ActionPak name: Example 1  
ActionPak code:

You may use these up/down buttons to change the order in which your ActionPaks appear.

#### Line items used in this ActionPak:

These line items currently make up this ActionPak. You may add more line items from the list of available ones at right. If you've mistakenly added a line item to the ActionPak, or want to remove one for any reason, you may do so, but you will lose any currently budgeted values for it.

Account number	Line item
5580	Advertising

Add or remove line items from the ActionPak:



#### Line items available for use in ActionPaks:

These are the list of line items that are available to become part of this ActionPak. You may select as many line items as you wish to include in the ActionPak by clicking the 'Add line item' button.

Account number	Line item
7020	Travel Conferences
7200	Meetings & Registrn
7201	Staff Training
6290	Miscellaneous
6296	Cash Over/Short
6297	Suspense
8792	Bookstore Purchases
8791	Intra-Inst Expense
8793	Intra-Inst Copy/Print
9502	Department Trfers In

- A new stack called **ActionPaks** will appear in your Navigation window. The section underneath will contain the name of your ActionPak.

- Click on the new section for the ActionPak and the ActionPak window will appear. Enter the requested amount in the By annual amount box in Step 1. *Enter the description of the initiative in the step 2 box. This is required. The description must contain details of the request sufficient to assess the need for the funding requested. [Step 2 appears to be optional in this screen shot?]*

## Example 1

- Continue to add additional ActionPaks as needed.

NOTE: Any line item which you used in an ActionPak will now appear as an additional line item within the general budget. . When you click on a section in your Navigation window that includes an ActionPak, you will see the general budget value, the ActionPak value and the total value for that line item.

- All P&L reports will display the total value for each line item.
- Run an ActionPak report to see the individual ActionPaks with their associated line items, amounts and notes.
  - In Advanced Reporting, Step 1, choose ActionPaks by Account or ActionPaks by Units box.
- Run the My Budget Decisions report to see the ActionPaks listed along with the final budget.

## Appendix 3 - Reviewing Headcount & Salaries

If you have Headcount (employees) in your unit and if you are authorized to review Headcount & Salaries, you will see a stack called **Headcount & Salaries** in your Navigation window.

Click the top section **Headcount Review** to make sure that you have the correct list of employees for your unit.

NOTE: In this section, you are verifying the current headcount and salaries. The information has been preloaded by the BudgetPak administrator.

### Headcount review

Please review your current headcount and answer the questions step by step. You can always come back later and change your answers.

Discard Close Save Next

#### Step 1

Review your current headcount below. Is the list complete and correct?

☐ Yes  
☐ No

If the details are not correct, please contact your administrator.  
Note: Please consider at this point ONLY your CURRENT headcount. We will ask about new hires later.

#### Current employees

Current employees as of 4/15/2016:

Filter ▼

Recalc

Show/hide columns...

Employee class	Employee ID	Name	Headcount / FTE	Allocation	Net headcount	Title	Hire date	Current salary	Employee notes

- c. Answer the question on **Step 2** and then click **Next** to take you to the next section in order. Or, you can click **Save** to save your entries then **Close** to return to the Navigation page.

### Headcount review

Please review your current headcount and answer the questions step by step. You can always come back later and change your answers.

#### Step 1

Review your current headcount below. Is the list complete and correct?

☒ Yes  
☐ No

If the details are not correct, please contact your administrator.  
Note: Please consider at this point ONLY your CURRENT headcount. We will ask about new hires later.

#### Step 2

Are any of your current headcount going to be leaving permanently, for any reason?

☐ Yes  
☒ No

#### Current employees

You can display additional columns or hide current columns by clicking the **Show/hide columns...** button. You can also make note in the Employee Notes column if needed.

## Headcount review

Please review your current headcount and answer the questions step by step. You can always come back later and change your answers.

Discard Close Save Next

### Step 1

Review your current headcount below. Is the list complete and correct?

☒ Yes  
☐ No

If the details are not correct, please contact your administrator.  
Note: Please consider at this point ONLY your CURRENT headcount. We will ask about new hires later.

### Step 2

Are any of your current headcount going to be leaving permanently, for any reason?

☐ Yes  
☒ No

Please contact BudgetPak Administrator if the headcount list is not correct.

### Current employees

Current employees as of 5/31/2016:

Filter

Recalc

Show/hide columns...

Employee class	Employee ID	Name	Headcount /FTE	Allocation	Net headcount	Title	Hire date	Current salary	Employee notes
Support LCCSSA	1231	LastName232, FirstName232	1.000	100 %	1.000	Accounts Payable Specialist	1/1/1901	\$20,000	
Support LCCSSA	1340	LastName341, FirstName341	1.000	100 %	1.000	Accounts Payable Specialist	1/1/1901	\$20,000	
Support LCCSSA	1344	LastName345, FirstName345	1.000	100 %	1.000	Cashier & Accounts Receivable Specialist	1/1/1901	\$20,000	
Support LCCSSA	1378	LastName379, FirstName379	1.000	100 %	1.000	Loan and Account Specialist	1/1/1901	\$20,000	
Support LCCSSA	1694	LastName695, FirstName695	1.000	100 %	1.000	Student Account Specialist	1/1/1901	\$20,000	
Support LCCSSA	1750	LastName751, FirstName751	1.000	100 %	1.000	Account Specialist	1/1/1901	\$20,000	
Administrative	1163	LastName164, FirstName164	1.000	100 %	1.000	Assistant Director	1/1/1901	\$20,000	
Administrative	1206	LastName207, FirstName207	1.000	100 %	1.000	Senior Director of Financial Planning & An...	1/1/1901	\$20,000	
Administrative	1410	LastName411, FirstName411	1.000	100 %	1.000	Director of Accounting	1/1/1901	\$20,000	
Administrative	1421	LastName422, FirstName422	1.000	100 %	1.000	Staff Accountant	1/1/1901	\$20,000	

Navigation ActionPaks What if...? View/edit drivers Across the board (all line items) Monthly spreading (all line items)

**Currently viewing**

Company: The College of NJ  
Unit: 10\_01\_1116: Physi  
Version: 2016 Final Budget  
Your budget's status is: Started

**Headcount/FTE**

As of 6/30/2015: 12.75  
Additions: -  
Reductions: -  
As of 6/30/2016: 12.75

**Version comparison**

Expense line items

This section: Headcount Review  
This unit: Physics  
Total: \$1,737,259  
Your difference: \$1,737,259

Note: Section totals are not meaningful on this page.

**Headcount review**

Please review your current headcount and answer the questions step by step. You can always come back later and change your answers.

Discard Close Save Next

**Step 1**

Review your current headcount below. Is the list complete and correct?

☒ Yes  
☐ No

If the details are not correct, please contact your administrator.  
Note: Please consider at this point ONLY your CURRENT headcount. We will ask about new hires later.

**Step 2**

Are any of your current headcount going to be leaving permanently, for any reason?

☐ Yes  
☒ No

**Step 3**

Are any of your current headcount going on leave of absence?

☐ Yes  
☒ No

**Current employees**

Current employees as of 2/19/2015:

Filter Recalc Show/hide columns...

## 2. New Hires: A tour of the New Hires Pages

- a. Answer the question in **Step 1**. If you respond Yes, then you simply move on to **Step 2**. If you respond No, then you may **Move on** Click on **Save** and **Close** [Next, Close?]

### New hires

If you want to budget any new hires, add them here. When you're finished, click the button below to move on. You can always come back later and change your answers.

Back
Close
Next

#### Step 1

Will you be hiring anyone?

☐ Yes  
☐ No

#### Step 2

Click below to add a new hire. You may add as many as you need by returning here and clicking again.

+ Add a new hire

When you have finished adding new hires, click 'Next'.

Note: You will have an opportunity to designate raises and bonuses for new hires and releases.

Click here to add a new hire to the budget for this version and unit. You will be brought to the New Hire pages

### New hires

This list summarizes your new hire selections. To revise or delete any of these new hires, select the 'Edit' or 'Delete' button.

Show/hide columns...

Employee class	Employee ID	Name	Allocation	Net headcount	Title	Type	Hire date	Current salary	Est. impact on budget	Employee notes	Edit new hire	Delete new hire
----------------	-------------	------	------------	---------------	-------	------	-----------	----------------	-----------------------	----------------	---------------	-----------------

b. Add a New Hire

i. Salary and start date

The estimated impact of this new hire on your budget is shown here and continuously updated as you move through the different parts of this page. The estimated impact of salary and start date is determined by your selections on this tab

Select type of new hire, new or replacement for someone who is leaving

## Add a new hire

### Impact on budget:

Est. impact of salary and start date: \$0  
Impact of new hire policies: \$0  
Total est. budget impact: \$0

Recalc.

Please answer the stepwise questions to designate the details for your prospective new hire. (You can always come back later and change the details.)

What type of new hire is this?

New

Optional: If you already know the new hire's name, you may enter it here (last name, first name).

New Hire

Employee ID:

### Salary and start date

### New hire policies

### Tax authorities

### Optional information

### Mapping

### Allocation

#### Step 1: Designate the starting salary

\$0 \$0

If the new hire's salary is outside the range listed above, you may enter it here.

Annual salary: \$0

#### Step 2: Designate the starting date

6/1/2017

5/31/2018

You may select the new hire's start date from the slider, or enter it into the box at right, or pick from the popup calendar.

Start date: 11/30/2017

Enter Annual salary

Designate the starting date for the new hire by moving the slider, or by entering a date in the box, or by picking a date from the pop-up calendar

Save

Cancel

ii. Tax authorities

Each employee is subject to national and local employment taxes (such as social security and SUI). Select the appropriate national and local tax authorities for this new hire.

Salary and start date   New hire policies   **Tax authorities**   Optional information   Mapping   Allocation

Step 4: Select the state

National:   Local:

United States   North Carolina  
North Dakota  
Ohio  
Oklahoma  
**Oregon**  
Pennsylvania  
Puerto Rico  
Rhode Island

This information is needed to calculate employment taxes for the new hire. Select the appropriate national and local tax authority from the from the list at the left. (This is usually the country of residence, and the state/province/county of residence.)

iii. Optional information

- 1) Enter the title for the new hire if you know it. It will display on page and on headcount reports.
- 2) If this new hire is not full-time, uncheck the box and enter the full time equivalent. NOTE: Be sure to always designate the *actual* annual salary for a new hire. For example, if the full time salary for a full time employee would be \$50,000, but you are designating an FTE of 0.5, then designate a salary of \$25,000.
- 3) Select the employee class for the new hire.
- 4) Enter a note to explain the purpose of the new hire.

Salary and start date
New hire policies
Tax authorities
**Optional information**
Mapping
Allocation

Step 5: Optional information

☒ This is a full-time employee  
If not, enter the full-time equivalent (FTE):   
Title:   
Pay start date:    
Pay end date:    
Employee class:    
Employee note:   
0 characters of 1024 maximum

If you'd like to add a note about why this hire is necessary, or some other note, you may do so here.

Save
 Cancel

You have unsaved changes!

#### iv. Mapping

If you would like to copy mappings for taxes and benefits, select an existing employee from the drop-down menu.

Step 7: Mapping

Copy mappings from an existing employee?

Base compensation    
Nat'l tax 1    
Nat'l tax 2    
Nat'l tax 3    
State tax 1

#### v. Allocation

1. Select if this new hire is allocated entirely to this unit or to other units

Salary and start date
New hire policies
Tax authorities
Optional information
Mapping
**Allocation**

Step 9: Allocation

☐ This employee is allocated entirely to this unit  
☒ This employee is allocated to other units as follows:

Change allocation...

- vi. If this employee is allocated to other units, click **Change allocation** and **Add unit** and change allocation information if needed. NOTE: you can make changes to all the white cells

Allocate headcount

Designate how this new hire should be allocated among units:

Unit	Home unit?	Percent allocation	Base compensation	National tax 1	National tax 2	National tax 3
40 0 5301: Business Office	<input checked="" type="checkbox"/>	100 %	5100: Administrative ...	5510: FICA Expense -...	5510: FICA Expense -...	5510: FICA Expense -...

100 %

Add unit

OK

Cancel

### 3. Salary Increases

- Step 1, pick the method you would want to use to give raises. Lewis & Clark uses **By percent**.
- Step 2, designate the scope of the standard raise, that is, to which set of employees it will be applied. Select **Give everyone the same salary increases by class**.

- c. Step 3. Designate the scope of the standard raise date; that is, to which set of employees it will be applied. Select **Use HR-defined date for everyone by class**.

## Salary Increases

Please review and answer the questions step by step. You can always come back later and change your answers.

Back Discard Close Save Next

You have unsaved changes!

### Step 1

How would you like to budget salary increases?

- ☒ By percent
- ☐ Allocate from a pool
- ☐ Fixed amount per employee

### Step 2

How would you like to handle percentage salary increases?

- ☒ Give everyone the same salary increases by class
- ☐ Give 'everyone except' the same salary increases by class
- ☐ Give salary increases by individual

### Step 3

How would you like to set the salary increases date?  
Note: HR-defined date varies by employee class

- ☒ Use HR-defined date for everyone by class
- ☐ Use HR-defined date for 'everyone except' by class
- ☐ Provide dates individually

### Step 4

Designate salary increases for each current employee (snapshot as of 4/15/2016) and new hires:

Recalc Show/hide columns... Actions...

Employee class	Employee ID	Name	Allocation	Net headcount	Title	Hire date	Current salary	Salary Increases %	Salary Increases \$	Salary Increases \$ (allocated)	New salary	Salary Increases date
----------------	-------------	------	------------	---------------	-------	-----------	----------------	--------------------	---------------------	---------------------------------	------------	-----------------------

This is the currently designated percent raise for each employee driven by Step 2. The standard raise will be automatically filled in for you

Driven by selection of Step 3

### Step 4

Designate salary

Recalc Show/hide columns... Actions...

Employee class	Employee ID	Name	Headcount / FTE	Allocation	Net headcount	Title	Hire date	Current salary	Salary Increases %	Salary Increases \$	Salary Increases \$ (allocated)	New salary	Salary Increases date
Support LCC...	1231	LastName232, FirstName2...	1.000	100 %	1.000	Accounts Payable Specialist	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Support LCC...	1340	LastName341, FirstName3...	1.000	100 %	1.000	Accounts Payable Specialist	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Support LCC...	1344	LastName345, FirstName3...	1.000	100 %	1.000	Cashier & Accounts Receiva...	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Support LCC...	1378	LastName379, FirstName3...	1.000	100 %	1.000	Loan and Account Specialist	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Support LCC...	1694	LastName695, FirstName6...	1.000	100 %	1.000	Student Account Specialist	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Support LCC...	1750	LastName751, FirstName7...	1.000	100 %	1.000	Account Specialist	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Administrative	1163	LastName164, FirstName1...	1.000	100 %	1.000	Assistant Director	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Administrative	1206	LastName207, FirstName2...	1.000	100 %	1.000	Senior Director of Financial ...	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Administrative	1410	LastName411, FirstName4...	1.000	100 %	1.000	Director of Accounting	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Administrative	1431	LastName432, FirstName4...	1.000	100 %	1.000	Staff Accountant	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017
Administrative	1046	LastName47, FirstName47	1.000	100 %	1.000	Assistant Treasurer/Account...	1/1/1901	\$20,000	0 %	\$0	\$0	\$20,000	9/1/2017

- Review details in **Taxes & Benefits** section. No changes are necessary, taxes and benefits are centrally managed by the administrator. Click each tab to review account totals. Click **Close**.

NOTE: Benefits for visiting and adjunct may need to be manually entered using account 5765.

## Taxes & Benefits

Back Discard Close Save Next

This section consists of 18 line items. To budget these line items, proceed through each step, one at a time. On each step you will budget a separate line item.

Line item 1 of 18

Line item 2 of 18

Line item 3 of 18

Line item 4 of 18

Line item 5 of 18

Line item 6 of 18

Line item 7 of 18

Step 1

FICA Expense - Calculated

5510

The annual budget for this line item has been automatically calculated. You may review it here, but not change it.

\$24,480

Step 2 (optional)

Would you like to make a note about this line item? If so, enter your note here. It will be printed on some PL reports. You may enter up to 1023 characters.

Edit Import notes from prior budgets

Category

Category code

Category description

Click 'Select' to choose categories

Select

Summary

This is a summary of the line items in this section.

Section total: \$27,389

Line item	Amount
1 FICA Expense - Calculated	\$24,480
2 Workers Comp Expense	\$640
3 Unemployment Expense	\$469
4 TIAA/CREF Pension Exp	\$0

- Review details in **Salaries & Wages** section. Click each tab to review account totals. Click **Close**.

## Salaries & Wages

[Back](#)
[Discard](#)
[Close](#)
[Save](#)
[Next](#)

This section consists of 7 line items. To budget these line items, proceed through each step, one at a time. On each step you will budget a separate line item.

Line item 1 of 7

Line item 2 of 7

Line item 3 of 7

Line item 4 of 7

Line item 5 of 7

Line item 6 of 7

Line item 7 of 7

Step 1

Administrative Staff Salaries

5100

The annual budget for this line item has been automatically calculated.

You may review it here, but not change it.

\$180,000

Step 2 (optional)

Would you like to make a note about this line item? If so, enter your note here. It will be printed on some PL reports. You may enter up to 1023 characters.

[Edit](#)
[Import notes from prior budgets](#)

Category

Category code	Category description
Click "Select" to choose categories	

Select

Summary

This is a summary of the line items in this section.

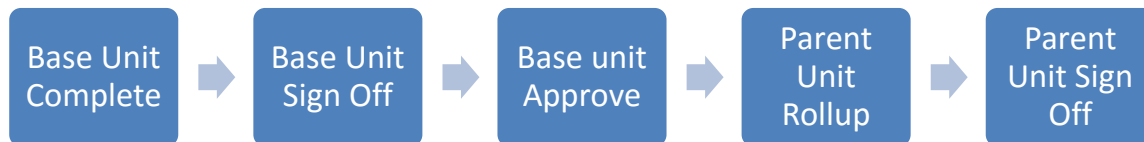
Section total: 

\$320,000

	Line item	Amount
1	Administrative Staff Salaries	\$180,000
2	Non-Base Other	\$0
3	Clerical Wages - LCSSA	\$120,000
4	Temporary Labor	\$20,000

## Appendix 4 - Approving Budgets

### Approval Workflow



Approval Managers have the responsibility of approving the budget for each of their units, as well as the roll-up unit to which they are assigned.

1. On the toolbar at the top of the window, click **Status**. The unit Status window displays, showing the budget status for all departments for which you are responsible.
2. In the upper left Select Version panel of the Status window, verify that you are viewing the Budget version you want.
  - In the Select Status Information panel, make sure that status box is checked.
  - Click update view with these selections.



7. Once you have signed-off, your budgets can be reviewed and rolled up by the next level of Approval Managers.