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Budget Tool: Budget Modifications

Note: Refer to the Budget Tool: General Navigation Guide for details about supported web browsers and steps for allowing pop-ups for cbp.duke.edu. The General Navigation Guide also has detailed steps for accessing layouts, navigating, loading data, using filters to reload filtered data, and using the funnel function to find and work with certain rows of data. These functions also apply to Budget Modifications.

Accessing the Budget Tool

1. Log onto work.duke.edu. (Do NOT type in http://www.)
2. Enter your NetID and password. Multifactor authentication is required.

On the Duke@WORK web portal screen:

3. Select the Budget tab.

4. Click on Budget Modifications.
5. Click on **Budget Mods** (only option on this screen at this time).
Entering the Budget Modifications for a Budget Package

1. Maximize the resulting screen to view all data.

2. If your Budget Modifications package number is known:
   - Enter your package number in the **Budget Package** field (if not known, use the next step to find the package by BFR Code).
   - Click on **Set Package**.
   - Verify the resulting Organizational Unit / BFR displayed beside the Set Package button is accurate (once package is set, fields will be grayed out and display only).
   - Proceed to the optional step 4 OR click **Load Data** (step 5).
3. To find your package number if it is not known, click on the **Drop-down** button in the **Budget Package** field and follow the steps below:

   a. On the blank line at the top, enter your 10 digit BFR Code or a part of the 10 digit code with an asterisk (*) as a wildcard (example = 686050*) or enter part of the BFR description enclosed in asterisks.

   b. Click the **Filter** button to find a list of possible BFR Codes with package numbers.

   c. Click in the box to the left of the row to select the desired Package Number corresponding to the desired BFR Code (once package is set, fields will be grayed out and display only).
4. **OPTIONAL**: Once the package is set, to filter within a package to a specific BFR code in that package, follow the summarized steps below (see Budget Tool: General Navigation Guide for detailed steps if needed):

- Click on the **BFR Hier Filter** button.
- Click on **Get BFR Hierarchy** button to load the BFR Codes that belong to the Budget Modifications package set in the first step – these display on the left side of the screen.
- Select one or more BFR Codes from the left side and use the **Add** button to move to the right side under *Chosen Selections*.
- Click the **Done** button.

5. Once selections are made, if not already done in a previous step, be sure to click on the **LOAD DATA** button.
6. Review the loaded data such as the fund, commitment item (G/L Account), Original Budget for the fiscal year being modified, and the Revised Budget input column for modifications (shown in white).

Note: When loading data, you may need to scroll to the desired line item. The view may open at a line item toward the bottom, so simply scroll up or down, as desired. Remember to maximize the screen for better viewing as well.
1. To filter the data seen on the report and apply functions to that filtered data, use one of the filter function options listed below and follow the next steps to use the filter (once filtered, budget functions like Inflate will only apply to the filtered data).

   - If you wish to view and apply functions to the data by Fund Group, click the **Fund Group Filter** button.
   - If you wish to view and apply functions to the data by Fund, click the **Fund Filter** button.
   - If you wish to view and apply functions to the data by Commitment Item (GL Account), click the **Cmmt Item Filter** button.
2. In the resulting Single Value/Value Range, click the **Get…** button in the top left corner to populate the selection options below on the left side.

3. Move the desired item from the left column to the right column under Chosen Selections, as follows:
   - Click in selection box to highlight the desired choice(s) on the left.
   - Click the ➡️ Add (right arrow) button.

4. Once items are listed under Chosen Selections, click the **Load Data** button.

5. Review the filtered data and apply budget functions to the filtered data as needed.

6. To remove a filter:
   - Repeat the steps above, highlight a chosen selection and use the ◀️ Remove (left arrow) button to clear the filter
   - OR use the **Clear All Additional Filters** button (above Filter buttons) to remove all filters at once.
Modifying the Budget

Use one or a combination of the next steps to populate or edit the Revised Budget column.

1. To populate the Revised Budget column with the Original Budget for the fiscal year and inflate as needed, click on the Inflated button and follow steps below:

   a. In the Inflate box, select Original Budget from the Base menu.

   b. To copy the Original Budget (current year) and not inflate, place the number 0 in the Inflation Percent field.

   c. To copy and inflate by a certain percentage, enter the percentage as a whole number (for example, use 1 to copy the Original Budget and inflate by 1%, etc.).

   d. Click OK.

   e. In the Warning box, read the message indicating all loaded data will be inflated, click Yes and click OK.

   Note: Using the Inflated function will overwrite any budget data already populated in the Revised Budget column, for all loaded data (loaded data could be ALL the data or the filtered data per the previous section). The Inflated function also overwrites any values entered directly into the column.
2. To input values directly into the revised budget column or make edits to existing amounts, enter amounts in the white, editable fields under the **Revised Budget** column.

3. If needed, use the buttons **Create a New Line Item**, **Change/Enter Spread**, or **Change Transfer/Offset** to enter the revised budget as outlined in the following pages.

4. Periodically, and certainly before exiting the layout, click the **Save** button to save the revised data (see Save the Budget Modifications section for more details).
Adding Notes for Budget Entries to Provide More Details

1. To provide more details for a desired line item, click on the smaller box along the left margin under the **Comment** column heading.

2. In the resulting Comment box, enter the note and click **Save Comment** (the Spell Check button is not active at this time).

3. A box labeled **Text** will appear on the line to indicate that a comment has been entered (comments may be viewed or revised simply by clicking on the Text box again).
Creating a New Line

1. To create an additional line for a new budget item, click the **Create New Line** button.

2. On the resulting Create New Line box, in the Fund field, either type in the new fund or use the drop-down box and select the fund from the resulting list.

3. In the Cmmt Itm (G/L Acct) field, either type in the six-digit Commitment Item or use the drop-down box and select the item from the resulting list.

4. In the New Revised Budget field, either enter the amount of the new line item or use the drop-down box, which functions as a calculator.

5. Press the **Enter** button on the keyboard after entering the New Revised Budget amount to activate the OK Button.

6. If you wish to change the Spread Code from the current setting, use the drop-down box to select another spread code.

7. Click **OK**.
8. Back in the layout, verify the new line has been added (the line item number will be 1 for a new Fund and Commitment item combination and will be 2 or higher if you add additional line items for the same Fund and Commitment Item combination).

9. Remember to click the **Save** button periodically and before exiting the Modifications layout (see Saving the Budget Modifications section for more details).
Updating Spreads

1. Select the line item whose spread you wish to change.
2. Click the Hide/Show Column button.
3. In the resulting window, click in the checkbox to select **Spread Code** from the list of columns (this action will add the column to the layout and activate the Change/Enter Spread button).
4. Click **OK**.
5. Verify that the Spread Code column is now displayed.
6. Click on the **Change/Enter Spread** button (this button is active only when the Spread Code column is displayed using the Hide/Show Column button in the previous steps).
7. In the resulting **Spread** box, use the drop-down button in the **Revised Spread Code** field to view a list of available spread codes.

8. On the resulting list, click the box to select the new spread code.

9. Once the Revised Spread Code is selected, if you wish to change the budget, enter the new figures in the Revised Budget field.

10. If the manual spread code of **HHH** was chosen, use the activated **Change Manual Spread** button to spread the budget manually.
11. If the Change Manual Spread button was used per the previous step, in the resulting Manual Spread box, enter the manual spread amounts in the desired months and press enter in any period to calculate and populate Period 12.

12. Click **OK**.

13. Verify a new line has been added for the changed spread code.

14. If you wish to hide the Spread Column, click on the **Hide/Show Column** button and uncheck the Spread Code box.

15. Remember to click on the **Save** button before exiting the layout (see Saving the Budget Modifications section for more details).
1. Click the **Filter Transfer/Offset** button to filter and display any G/L Account lines requiring Transfer/Offset data.

2. Review the Transfer/Offset column now displayed and note any rows with no offset listed in this column as indicated by the # symbol.

3. Select the line item whose transfer/offset you wish to update (ensure an amount is input into the Revised Budget column).

4. Click on the **Change Transfer/Offset** button (this button is active only when data is filtered using the Filter Transfers/Offsets button).
5. In the resulting box, enter the fund code for the other side of the transfer or offset for budget purposes in the **Transfer/Offset** field.

6. Verify or revise the amount in the **New Year Budget** field.

7. Click **OK**.

8. Review the new row added for the transfer/offset that was added.

9. **IMPORTANT**: Before saving, you must click on the **Filter Transfer/Offset button** again to remove the filter and display all the loaded data (see message example above).

10. Remember to click on the **Save** button before exiting the Modifications layout (see Saving the Data section).
Saving the Budget Modifications

1. Periodically as data is modified and before exiting the Budget Modifications layout, click on the **Save** button to save the data.

2. When saving, note the following summary about this process (see the Budget Tool Basics Guide for more details):
   - Multiple messages are generated at the top of the screen to indicate various edits were processed and the data was saved.
   - Messages with a green check symbol indicate steps were successful – ignore all of these EXCEPT look for the **Data is saved** or similar message as this indicates all the data was saved.
   - Review any messages with the yellow warning symbol – these are warnings and no action is required before saving the data.
   - Address any messages with the red stop sign symbol – these indicate an action is required before the data may be saved.