Non-Position Budgeting (cont.)

Entering Budget Data in the Layout

Note: Except where indicated, the examples used in this section are based on the Non-Position by Package layout. The loaded data and functions available are similar between these two layouts.

1. Notice the following tips about the Non-Position loaded data:
   - The view may open at a line item toward the middle or bottom of the layout, so simply scroll up to the top of the data in the layout.
   - Maximize the web browser window for better viewing and to avoid locking data by improperly exiting the layout.
   - Columns remain visible at the top of the page as you scroll down.
   - The input column for the New Year Budget is not populated.
   - Non-Position data is displayed and budgeted by Fund (Cost Object) and Commitment Item (G/L Account) level.
   - The 7 digit Fund and Fund Description will repeat on every line item of the layout as reference on each line item.
   - Budget data for Position is shown as display only (shaded in gray) as reference for a total view of the budget by Fund. Position data cannot be changed in this layout.
2. Review the default columns of Non-Position data as outlined below:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checkbox to Select</td>
<td>Click in the box in the first column to select the row. A gold highlight indicates the row is selected.</td>
</tr>
<tr>
<td>Comments</td>
<td>Select the smaller gray boxes to display a Comments dialog box where free-form text may be entered - see Budget Tool: General Navigation Guide. The box will populate with the word Text once a comment is entered and saved to indicate a comment has been added. Comments may be revised and viewed by reopening the Comments box. Comments are not saved permanently until the layout is saved.</td>
</tr>
<tr>
<td>Fund and Fund Description</td>
<td>The 7 digit Fund (Cost Object) for the line item of the budget and corresponding description.</td>
</tr>
<tr>
<td>Fund Group</td>
<td>A value to indicate the Fund Group of the Fund (examples U = Unrestricted, A = Allocated, R = Restricted, etc.).</td>
</tr>
<tr>
<td>Commitment Item (G/L Acct) and Description</td>
<td>The 6 digit Commitment Item (G/L Account) for the line item of the budget and corresponding description.</td>
</tr>
<tr>
<td>Line Item</td>
<td>Number of the line item for a specific Fund and Commitment Item (G/L Acct) combination.</td>
</tr>
<tr>
<td>Budget Package</td>
<td>System assigned Budget Package number for reference.</td>
</tr>
<tr>
<td>Prior Year Actuals</td>
<td>Prior Fiscal Year’s Actual dollars from SAP as reference.</td>
</tr>
<tr>
<td>Current Year’s Budget</td>
<td>Current Year’s Budgeted dollars as reference.</td>
</tr>
<tr>
<td>Current YTD Actuals</td>
<td>Current Year- to-date actual dollars from SAP as reference.</td>
</tr>
<tr>
<td>New Year’s Budget A</td>
<td>Input column used to enter the new year’s budget dollars for each line item of the Version being used (Version A = official version and default). Version B will be displayed in the column if you are using Version B for budget scenarios. See Budget Tool: General Navigation Guide for more on Version A and B.</td>
</tr>
<tr>
<td>% Change From Current Year A</td>
<td>The calculation of the percent of change between the Current Year Budget and the New Year Budget for the version being used (Version A is default).</td>
</tr>
<tr>
<td>$ Change From Currency (Current) Year A</td>
<td>The dollar amount of the change between the Current Year Budget and the New Year Budget for the version being used (Version A is default).</td>
</tr>
</tbody>
</table>

Note: Columns may be hidden or additional columns shown using the Hide/Show Columns button. In addition, click on column headings to sort and subtotal. See Budget Tool: General Navigation Guide.
Non-Position Budgeting (cont.)

3. Use the next steps to populate the New Year Budget column and/or enter dollar amounts into the fields of the New Year Budget column.

Populate the New Budget Using Inflated

Note: The Inflate button allows you to use a base and apply a percent of inflation to that base in order to populate the New Year Budget column. This step is often used to populate budget data and then change amounts on a line by line basis for the inflated data.

This option will overwrite any Non-Position budget amounts that are already entered in the white input column on the layout for individual Fund / Commitment Items (G/L Accts).

1. Before using the Inflate button, review all loaded data as follows:
   • Determine if any New Year Budget (white input) column amounts will be overwritten (see Step 2 on Additional Filters)
   • Be aware that if data is visually funneled, the Inflate will overwrite all LOADED data, not just what is displayed.
2. If needed, use the **Additional Filters** to filter or re-load the data in the layout for the Inflate function per the options listed below:

- **Fund Group Filter** – to filter data to one or more fund groups and apply functions like Inflate or adjust budget data – example R = Restricted.

- **Fund Filter** – to filter to one or more seven-digit Funds (Cost Objects) and apply functions like Inflate or adjust budget data.

- **Cmmt Item Filter** – to filter to one or more six-digit Commitment Items (G/L Accounts) and apply Inflate or adjust budget data.

*Note: Refer to the [Budget Tool: General Navigation Guide](#) for steps on how to use the Additional Filter buttons.*

3. Click on the Inflate button.
4. In the resulting Inflate dialog box, enter the values as outlined in the next steps.

5. Click on the **Drop-down** button in the **Base** field and select a base for which to apply the inflation percent (Current Year Budget, Prior Year Actuals, or a Projection).

   **Note:** If using a Projection as the base, use the **Hide/Show Columns** function to display the appropriate Projection (currently only the Working Projection column may be displayed) in the layout. See the **Budget Tool: General Navigation Guide** for more on the **Hide/Show Columns** button.
6. Enter the percent to inflate the Base amounts in the **Inflation Percent** field per examples below:
   - To **copy the base amounts and NOT inflate** the amounts, use a **0 (zero)** percent inflation.
   - To **copy and inflate** by a certain percentage, enter the **percentage as a whole number**.
   - To help with calculating a percent, use the **Calculator Drop-down** button beside the Inflation Percent field.

7. Click **OK**.

8. Read the message prompting to inflate all loaded data and click the radio button for **Yes** if the message is correct (click **No** as needed).

9. Click **OK** to populate the New Year Budget column with the inflated values based on your selections.
10. Review the results with the New Year Budget column populated with the inflated values based on your selections.

11. Repeat these steps if needed to work with other Additional Filters and the Inflate function. You may also adjust line items by directly entering amounts into the New Year Budget column as needed.

   **Note:** Be sure to use the Clear Additional Filters button to load ALL data again as needed.

Remember if you use Inflate on ALL loaded data, you will overwrite any amounts in the New Budget Column that have already been populated or entered when data was filtered.

12. Click in the check box under the Comments column to add a comment for a specific line item as needed (see Budget Tool: General Navigation Guide for detailed instructions).

13. Click on Save.
Non-Position Budgeting (cont.)

Manually Enter or Adjust the New Budget

1. Use the **Funnel** button (upper right corner of layout) to **visually find and display line items in order to quickly enter** budget amounts as needed. Note the following when using this visual filter:
   - See the Budget Tool: General Navigation Guide for specific ways to use the **Funnel** button.
   - The Funnel function displays certain line items, but ALL data is still loaded.
   - Any planning functions like Inflate will be applied to all the loaded data, not just the lines displayed using the visual filter.

2. Click in the white input fields in the **New Year Budget** column, enter the amount (**enter as whole numbers, no decimal places**) and press Enter on the keyboard to enter the value.
   
   *Note:* **As a timesaver, once in a field in the New Year Budget column, use the Down button on your keyboard to move from one item to the next and enter values.**

3. Click in the check box under the Comments column to add a **comment for a specific line item** as needed (not shown above - see Budget Tool: General Navigation Guide for detailed instructions).

4. Click on **Save**.