Create a New Line

Note: When entering your budget you may need to create a new line item or add an additional line item for a specific Fund and Commitment Item (G/L Account) combination. The Create New Line function varies slightly depending on if data was loaded via Selection by Package or Selection by BFR. Both set of steps are included in the section with Selection by Package first and then Selection by BFR.

Create New Line for Data Loaded via Selection by Package

1. To create a new line item for a Fund and Commitment Item (G/L Account), click on the Create New Line button.
Non-Position Budgeting (cont.)

In the resulting *Create New Line* window (Selection by Package):

2. In the **Fund** field, either type in the cost object for the new item or use the **Drop-down** and select the fund from the resulting list. Press **Enter**.

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

4. In the **New Year Budget** field:
   - Enter either the amount of the new line item or use the **Calculator Drop-down**, which functions as a calculator.

**Note:** For entered data to register properly, press the **Enter button on the keyboard after inputting each piece of data. If a box is “gray”, it is likely because Enter was not selected.**
5. If a Commitment Item (G/L Account) is used that needs an appropriation **Transfer/Offset**, press **Enter** per the step above to enable the Transfer/Offset field and enter the offsetting cost object / fund. Change the **Spread Code** if needed. Press **Enter**.

6. Click **OK**.

**Note:** If the OK button is not active, got back to the data entry fields and confirm you selected Enter in each field.

7. Review the results and note the following:

- New line items for a new Fund and Commitment Item (G/L Account) combination display with a 1 in the **Line Item** column.
- Additional line items added for a Fund and Commitment Item (G/L Account) combination that already exists on the layout display with a 2, 3, etc. in the **Line Item** column.
8. 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).

9. Click on **Save**.
Non-Position Budgeting (cont.)

Create New Line for Data Loaded via Selection by BFR

1. To create a new line item for a Fund and Commitment Item (G/L Account), click on the Create New Line button.

2. IMPORTANT: Once the Budget Package number is entered, press Enter on the keyboard to set the package for edits and activate the other input fields. Other fields will appear gray until Enter is selected.
3. Enter the Cost Object for the new line item in the **Fund** field.

4. Enter the G/L Account for the new line item in the Commt Itm (G/L Acct) field.

5. In the **New Year Budget** field:
   - Enter either the amount of the new line item or use the **Calculator Drop-down**, which functions as a calculator.

6. If a Commitment Item (G/L Account) is used that needs an appropriation **Transfer/Offset**, press **Enter** per the step above to enable the Transfer/Offset field and enter the offsetting cost object / fund. Change the **Spread Code** if needed. Press **Enter**.

7. Click **OK**.

*Note:* If the OK button is not active, got back to the data entry fields and confirm you selected Enter in each field.
8. Review the results and note the following:

- New line items for a new Fund and Commitment Item (G/L Account) combination display with a 1 in the Line Item column.

- Additional line items added for a Fund and Commitment Item (G/L Account) combination that already exists on the layout display with a 2, 3, etc. in the Line Item column.
Non-Position Budgeting (cont.)

9. 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).

10. Click on Save.

Enter the New Budget by Unit and Rate

Note: This option is only available in the Non-Position layout. This option is good for preparing the budget for tuition and fees or other budget items where the amount is calculated by multiplying a number of units by a specific rate.

1. Click in the box and select a line item to be budgeted by units and rates.

2. Click on Units and Rates button.