Selecting and Loading Data in Layouts

There are two options for selecting and loading data in the layouts, selecting by BFR Code or selecting by Package. While it is recommended that data be loaded by Package, regardless of which option is used, the loaded data and available planning functions are basically the same for that layout. This applies to Budget Development (Position and Non-Position budget data) and Projections. Budget Modifications also uses one of the options outlined in this section of the guide.

Selecting by Package

Note: While security is controlled by the organizational BFR Code, a package is a systematically assigned number used as an organizational identifier to help with the Workflow process. A package might be assigned at a higher level BFR Code like 5200000000 or at a lower level BFR Code. If you know your package number, it is recommended that you select by package and you should use these steps. Package numbers are unique to each function within the Budget tool. (Development, Modifications, and Projections will all have different package numbers.)

1. To select by a package number if known, click on the underlined link that indicates “by Package”, for example in Budget Development for the Non-Position layout, click on the Non-Position by Package link.
Selecting and Loading Data (cont.)

2. On the **Budget Package Selection** screen, enter your package number in the Budget Package field. Consult your Management Center if you do not know your package number.

3. Click on **Set Package**.

4. Review the information about the package chosen, such as the number and name of the Org Unit / BFR code selected for that package and the stage/level for workflow.

5. **OPTIONAL**: Once the package is set, follow the summarized steps below to filter to a specific BFR code(s) in that package – these steps are similar to the detailed steps for selecting by BFR:
   - Click on the **BFR Hier Filter** button.
   - Click on **Get BFR Hierarchy** button to load the BFR Codes that belong to the package set in the first step; these display on the left side of the screen.
Selecting and Loading Data (cont.)

- 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.

6. Once selections are made in the previous steps, click on **LOAD DATA** to populate the lower screen with the selected data.

7. Review the loaded data and refer to the appropriate guide for details on working in the various layouts (Budget Development Guide, Budget Modifications Guide, Projections Guide, etc.)

   *Note:* When loading data, the view may open at a line item toward the bottom, so simply scroll to the top of the data. Remember to maximize the screen for better viewing as well.

Selecting by BFR Code

1. To select by BFR Code, click on the **underlined link that indicates “by BFR”**, for example in Budget Development for the Non-Position layout, click on the **Non-Position by BFR** link.
2. Enter the appropriate 4 digit value (e.g., 0010) in the **Company Code** field.

3. Click on the **Set BFR** button.
Selecting and Loading Data (cont.)

In the resulting *BFR Hierarchy Selection* window:

4. Enter a single 10 digit BFR Code in the **Single Value** field.

**OR**

5. To find your BFR Code or select multiple BFR Codes, use the **Get BFR Hierarchy** to view and select BFR Codes as outlined below:

   - Note that only the BFR Codes for which you have security access in the Budget tool will populate on the left side.

   - For those with higher level organizational access, use the **Twistee** buttons to open nodes of hierarchy and locate the desired BFR Codes (*Organizational Plan, DUKE – DUKE, 10 - Duke University or other University related company codes, etc.*). Contact your Management Center representative if you need assistance.

   - Click on the box beside each BFR Code (highlighted in gold) to be selected and use the **Add** button to display the BFR Code under *Chosen Selections* (on the right).

   - To select multiple BFRs, use the Shift key for consecutive BFRs or use the CTRL key to select non-consecutive BFRs.
6. Once a single value is entered or the BFR Code(s) are chosen using the Hierarchy steps outlined above, click on **Done**.

7. Back on the Layout screen, review the BFR Code(s) displayed and click on **LOAD DATA**.
8. Review the loaded data and refer to the appropriate guide for details on working in the various layouts (Budget Development Guide, Budget Modifications Guide, Projections Guide, etc.)

Note: When loading data, the view may open at a line item toward the bottom, so simply scroll to the top of the data. Remember to maximize the screen for better viewing as well.