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Introduction to the Budget Tool

The Budget tool, located in the Duke@WORK web site, works with Duke’s SAP system to support the following processes and related functions:

- Budget Development - to develop the annual budget and multi-year plans at Duke.
- Budget Modifications - to modify the budget during a certain window of time.
- Projections - for board reporting.
- Workflow – to pull the budget up from one stage to another in the workflow process. This function is only available and displayed to those who have the security access to perform this function.
- Reports - to generate and analyze reports related to Budget Development, Budget Modifications, and Projections.

Within each of these functions are layouts that can be used to enter information for the budget development, budget modifications, and projections. The navigation and customization of these layouts are similar across the various functions. So for example, once you know the general steps for selecting and loading budget data in a layout or how to use the additional data filters in a layout, those general steps are similar in all other layouts.

This guide outlines the general navigation and customization options that are similar across all the Budget tool layouts. There are also individual guides for Budget Development, Budget Modifications, Projections, Workflow, and Reporting for more specific details on performing those functions.
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. On the SBP iView, review the **underlined name links** available for functions as follows:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Budget Development</strong></td>
<td>Contains layouts to develop the annual budget for the next fiscal year, including layouts for Position and Non-Position.</td>
</tr>
<tr>
<td><strong>Budget Modifications</strong></td>
<td>Contains a layout to enter Budget Modifications</td>
</tr>
<tr>
<td><strong>Projections</strong></td>
<td>Contains layouts to do projections for board reporting, including:</td>
</tr>
<tr>
<td></td>
<td>- Fall / Spring Projections (by Package and by BFR)</td>
</tr>
<tr>
<td></td>
<td>- Working Projections (by Package and by BFR)</td>
</tr>
<tr>
<td></td>
<td>- Multi-year Projections (by Package and by BFR)</td>
</tr>
<tr>
<td></td>
<td>- Projection Upload</td>
</tr>
<tr>
<td><strong>Workflow</strong></td>
<td>Allows users with workflow security access to pull the budget up from one stage to another in the workflow process.</td>
</tr>
<tr>
<td><strong>Reports</strong></td>
<td>Contains various types of reports for Budget Development, Budget Modifications, Projections, and Workflow.</td>
</tr>
</tbody>
</table>
Allowing Pop-up Windows from Duke@WORK

Note: Internet Explorer, Mozilla Firefox, and Google Chrome are the supported browsers for SAP and related systems at Duke. These general steps below may vary slightly depending on the version of the web browser that you are currently using in your area. **It is critical that pop-ups are allowed for the Budget tool to function properly. Not allowing pop-ups, will result in data being locked.**

Internet Explorer 11

1. Click on the menu path: **Tools > Pop-up Blocker > Pop-up Blocker Settings**
   
   **Note:** If Pop-up Blockers are already “turned off” then this step is not needed. If the option “Turn Off Pop-up Blocker” is displayed, then Pop-up blockers are turned on and the web site needs to be added to allowable sites that are allowed to display pop-up windows.
Accessing the Budget Tool (cont.)

2. Enter `cbp.duke.edu` in the Address of web site to allow field and click on the Add button.

3. Verify the web site is now displayed in the Allowed sites section

4. Click on the Close button.

Mozilla Firefox 56

1. On the far right of the screen, click on the Open Menu button and click on Options.
Accessing the Budget Tool (cont.)

2. On the **Options** tab, select **Privacy and Security**.

3. Click on the **Exceptions** button.

4. Enter **cbp.duke.edu** in the **Address of website** field.

5. Click the **Allow** button to add the URL to the list of allowed sites.
Accessing the Budget Tool (cont.)

Chrome 61

1. Select the Customize and control Google Chrome icon in the top right of the browser.
2. Select **Settings** to open a new page.

3. At the bottom of the **Settings** page, click on **Advanced**.

4. Under Privacy and security, click on **Content settings**.
5. Click on **Pop-ups** found in the middle of the screen.

6. Click on Add and enter https://cbp.duke.edu.

7. Allowed site will display.
Navigating in the Budget Tool

Using Underlined Name Links

1. Once in the Budget tool, click on an underlined name link to navigate to a desired function (for example Budget Development).

   Note: An alternate way to navigate is to use the Detailed Navigation in the left margin (see next section). Breadcrumb links are also available to use to return to previous screens.

2. Review options displayed and click on the underlined name link to access a layout for that function (for example Non-Position).
Navigating (cont.)

3. Click on the underlined name link for the desired layout option and begin working. (for example Non-Position by BFR allows you to select and load your budget data by BFR Code).

4. For more information about loading data, continue to the section in this guide for selecting and loading data for a layout.
Navigating (cont.)

Using the Detailed Navigation Pane

Note: An alternate way to navigate is to use the Detailed Navigation in the left margin. If Detailed Navigation is not displayed, use the Open Tray button to display the links. Breadcrumb links are also available to use to return to previous screens.

1. If the Detailed Navigation pane in the left margin is not displaying items, click on the Twistee to open the pane.

2. Click on the Twistee icons to open the folders for functions and layouts as needed (example Budget Development and then Non-Position).
3. Once a folder is fully opened (indicated with dots beside options), click on desired option to open a layout (example Non-Position by BFR).

   **Note:** *Breadcrumb links are also available to use to return to previous screens.*

4. For more information about loading data, continue to the section in this guide for selecting and loading data for a layout.
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.
Selecting and Loading Data (cont.)

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.
Using Additional Data Filters

Additional filter buttons allow you to work with a designated subset of loaded data.

Using a filter basically “re-loads” the data based on the filter chosen and allows you to apply planning functions like the Inflate function to a subset of the data versus ALL loaded data for a BFR Code or Package.

A few examples are as follows:

- **Fund Filter** = available in all layouts, this filter allows you to “re-load” or filter the data from an entire BFR Code/Package with many fund codes/cost object to one single fund without exiting a layout. Then a function like Inflate will only apply to that Fund.

- **PSA Quick Filters and PSA Filter** = available in the Budget Development Position layouts, these filters allow you to “re-load” the data for an entire BFR code/Package based on positions. PSA Quick Filter narrows data from all the positions to just positions for Biweekly, Staff, or Faculty. The PSA Filter button allows you to filter to more specific Personnel Sub-areas, like Faculty, Regular Rank or Faculty, Tenured.

While the Additional Filter buttons vary by the type of layout there are different choices for Budget Development Position and Non-Position layouts, the basic steps to use the buttons are the same.

Refer to the specific guides for Budget Development, Budget Modifications and Projections for the additional filters available in those respective layouts. The general steps are outlined in this section of the guide.
Additional Filters (cont.)

**General Steps**

*Note:* The Fund Filter is the example used for general steps as that filter is available across layouts.

1. To filter and re-load data, click on one of the filter buttons under **Additional Filters** per the options available on each type of layout:

<table>
<thead>
<tr>
<th>Filter Type</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The following filters are available on ALL layouts:</strong> Budget Modifications, Projections, Budget Development: Non-Position &amp; Position</td>
<td></td>
</tr>
<tr>
<td>Fund</td>
<td>Filters data by a specific 7 digit fund (cost object) or multiple funds</td>
</tr>
<tr>
<td>Fund Group</td>
<td>Filters data by fund group or multiple groups (example U = Unrestricted, A = Allocated, R = Restricted)</td>
</tr>
<tr>
<td>Commitment Item (G/L Account)</td>
<td>Filters data by a specific 6 digit G/L Account, multiple G/L Accounts, or G/L Account Groups</td>
</tr>
<tr>
<td><strong>The following filters are available on Budget Development: Position Only</strong></td>
<td></td>
</tr>
<tr>
<td>Provisions</td>
<td>Available on Funded view, filters data to lines with funding of Provisions (supplements, etc.) that are indicated with X in Provision column.</td>
</tr>
<tr>
<td>PSA Quick Filters</td>
<td>Check boxes allow quick filter of funded or owned data from ALL employees to Personnel Sub-areas of Faculty, Staff, and/or Biweekly</td>
</tr>
<tr>
<td>PSA Filter - Funded or Owned</td>
<td>Filters data to a specific Personnel Sub-area like Faculty Regular Rank, Faculty Tenured, etc. (available on Funded and Owned view)</td>
</tr>
<tr>
<td>Position Filter Funded or Owned</td>
<td>Filters data to a specific Position (available on Funded and Owned view)</td>
</tr>
</tbody>
</table>

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In the resulting window (title varies by filter; Funds in this example):

2. Enter a single value or range of values if known (a 7 digit Fund/cost object in this example) and click on the Load Data button.

OR

3. To view a list of all the values (Funds/cost object in this example) included in all loaded data, use the Get (name varies) button (the Get Fund button is used in this example) and follow the next steps.
4. Once the Get Funds (or other) button is used, **review the populated data on the left side of the window** for all the selected values available for the loaded data (Funds/cost objects in this example).

5. **Select one or more values from the left side** by clicking on the box to the left of the value and highlighting that row in gold.

6. Once one or more items are selected, click on the **Add button to move to the right side** under Chosen Selections.
7. Once data is listed under Chosen Selections, click the **Load Data** button to re-load the data from all data selected to the filtered data chosen.
8. Review the filtered data that is now loaded in the layout for just the values selected.

   *Note: Remember that functions like Inflate will apply ONLY to the re-loaded filtered data at this point.*

9. Notice the button now displays as **Fund Filter Has Values** to indicate that you used this additional filter and there are filtered values (name of button varies by filter).

10. To clear the filters, use one of these options:

    - **Clear All Additional Filters** to remove filters and re-load ALL data as needed.
    - If multiple filters are used and you do not wish to clear all filters, simply repeat the steps above and remove any values for a specific filter and Load Data to reset one filter.

    *Note: Once filters are removed, any action taken to “Loaded Data” will overwrite actions while data was filtered.*
11. **OPTIONAL:** If you are not using the Additional Filters, use the **Hide/Show Additional Filters** button to hide the entire Additional Filters tray from view and show the tray again when needed.

   **Note:** All functions within that tray will not be displayed, including for example, not only the Additional Filter buttons to the left and middle of the tray, but Transfers/Offsets Filter and Inflate buttons on the right for Non-Position. Open the tray again to see those options as needed. It is recommended that you keep Additional Filters displayed.
Using the Funnel to Find Line Items

The Funnel button works like a Find button to visually locate and display one or more line items and work individually with those line items. This button is available in all layouts and Budget tool functions.

**IMPORTANT:** While this button funnels the view of the data displayed on the layout to just the line items that meet the search criteria, functions like Inflate will still apply to ALL loaded data. So this button DOES NOT work like the Additional Filter buttons outlined in the previous chapter of this guide. Again, the Funnel button is ideal for entering the budget on each line item and for finding certain line items easily.

1. To find certain lines and funnel the view of the data displayed in the layout to just those lines, click on the **Funnel** button.
Using the Funnel (cont.)

2. Notice the white line item that’s added at the top of the layout with empty fields under each column.

<table>
<thead>
<tr>
<th>Comment</th>
<th>Fund Description</th>
<th>PS</th>
<th>Committee (G/L Acc)</th>
<th>Description (G/L Acc)</th>
<th>U</th>
<th>FY19 Provisioned</th>
<th>FY2019 Current Year</th>
<th>FY2020 Current Year</th>
<th>FY2021 Actual</th>
<th>FY2021 Budget</th>
<th>% Change from Current Year Budget</th>
<th>% Change from Last Year Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>1230772</td>
<td>ABM4</td>
<td>R</td>
<td>23456</td>
<td>FUNDING PROJECTS</td>
<td>1</td>
<td>2000</td>
<td>0.0000</td>
<td>0.0000</td>
<td>0.0000</td>
<td>0.0000</td>
<td>0.0000</td>
<td>0.0000</td>
</tr>
</tbody>
</table>

3. Enter text or numeric values in white fields under a column to find line items with matching values in the layout, as outlined below:
   - Use the * asterisk as a wild card along with text or numbers (in this example, *Jappe* is entered in Fund Description field).
   - Use one or multiple fields to find line items (in this example, 645000 also entered in the Commitment Item (G/L Acct) field).
   - Other examples include entering a 7 digit fund/cost object in the Fund field or even entering **Text** in the Comment column field to see all the line items with comments entered (see Tips for Entering Data for how to enter Comments).

4. Press **Enter** on the keyboard to find the matching line items for the values entered.
5. Review the funneled results of just the line items meeting the search / find criteria entered on the white input line.

Note: While this button funnels the view of the data displayed on the layout to just the line items that meet the search or find criteria, functions like Inflate will still apply to ALL loaded data. So this button DOES NOT work like the Additional Filter buttons outlined in the previous chapter of this guide. Again, the Funnel button is ideal for entering the budget on each line item and for finding certain line items easily.
6. To remove the funneled results and return to ALL the loaded data:
   • Delete values and press Enter on the keyboard
   OR
   • Click on the **Funnel** button in the upper right corner of layout again, which removes both the white input row and the funnel.

7. Review the results showing funneled data view is gone and all loaded data is now displayed in the layout again.

   **Note:** Comments are not permanently saved in the layout until the layout is saved.
Tips for Entering Data

The steps for entering data are covered in detail in the respective Budget Development, Projections, and Budget Modifications Guides. This section outlines some tips about features that apply to all layouts.

Add Comments to a Line Item

Comments may be easily added as data is entered into a layout. The comments are there to help document details needed about the data entered. Comments are linked to the line item and are easy to display on that line item.

1. To enter a comment for a line item, simply click on the checkbox in the Comment column.
2. In the resulting window, enter the comment as free form text.

3. Click on **Save Comment**.

4. Review the results displaying the word Text in the Comment column to indicate that a comment has been added for that line item.
Tips for Entering Data (cont.)

Calculator Drop-down in Input Fields

All white input fields for columns in a layout (New Year Budget, Fall or Spring Projections, etc.) contain a calculator function in the drop-down of the field. In addition, this calculator is available in the input fields on many planning functions as well (see two examples below).

1. To display and use the calculator function:
   - Click into the input field in the layout.
   - OR
   - Click in an input field in a planning function like Create New Line (Budget Development, Non-Position Layout).

2. Click on the **Calculator** icon.

3. Use the Calculator functions by clicking on buttons and entering amounts. Click OK when done to enter the calculated value.
Customizing the Display of the Layout

The layouts within the Budget tool provide several ways to customize your display. These steps are applicable across the layouts and Budget tool functions.

**Note:** Customized layouts are not saved. You will be returned to the default layout each time you go into a layout in the Budget tool.

### Hide and Show Columns

1. To hide or show columns displayed in the layout, click on the **Hide/Show Columns** button.

In the resulting **Hide/Show Columns** window:

   ![Hide/Show Columns Window](image)

   **Note:** A check beside a column name indicates the column is already displayed in the layout.

2. Review the column names already checked and currently displayed in the layout.
3. **Click in the boxes** beside the column names to check and uncheck the columns to be displayed (in this example **Spread Code and Stage** were selected with checks to show those columns).

4. Click **OK** when done.

5. Review the extra column(s) now hidden or showing in the layout (in this example, both Spread Code and Stage were checked and displayed in the layout.

*Note:* Some planning functions within a layout might require you to first show a column before using that function. One example is in the Budget Development Non-Position layout, you must add the Spread Code column before you can use the Enter Spread Code button.
Customizing the Display (cont.)

Sort and Subtotal by a Column

The layouts within a column already have sorting by certain columns. However, there is no subtotaling associated with those sorted columns in the original view based on the selection by BFR or by Package.

IMPORTANT: Sorting by a column using the steps in this section will also provide subtotaling by that column. These steps apply to sorting on one column heading at the time. See the Add Multiple Sort/Subtotal Section for information on sorting on more than one column.

1. Before sorting by a column, review the original layout and the triangle icons in the column heading indicating how the layout is sorted by default (no subtotals are associated with the columns that are sorted in the original view of a layout).
2. To sort and subtotal by one column, simply click on the column heading desired (see two examples above, one by Fund, the other by Commitment Item).
3. To change the sort order from Ascending (lowest to highest value) to Descending (highest to lowest value) simply click on the column heading again to reverse the order of the sort.

4. To remove the subtotal associated with sorting, to remove the sort and subtotal combination or to sort by multiple columns, see the steps in the Other Settings via the Open Settings Dialog Button section of this chapter using the Open Settings Dialog (Wrench) icon.
Customizing the Display (cont.)

Other Settings via the Open Settings Dialog Button

1. To use more sorting options, (like removing subtotals, resetting a sort, or changing the subtotals), click on the **Open Settings Dialog** button to display the **Settings** dialog box.

2. Use the Sort Sequence, Calculation (Subtotal), and Display tabs along with the steps outlined in the following pages to customize the layout settings.
Customizing the Display (cont.)

Remove Automatic Subtotals When Sorting by Column Heading

On the Calculation tab in the Settings box:

1. Click on the Calculation tab.

2. To remove the automatic subtotaling that happens when sorting by column headings, click on the checkbox beside Display Intermediate results for Sorted Columns to deselect this defaulted option.

   Note: Remember that simply clicking on a column heading will sort and subtotal on that column heading by default.

3. Click Apply to see the changes in the grayed out view of the layout.

4. Click OK to display the subtotals added in the layout.

   Note: As long as this option is deselected, the subtotals will not automatically apply when clicking on a column heading to sort. This step must be repeated each time you exit and return to a layout.
Remove Sort / Subtotal Selections

On the Sort Sequence tab in the Settings box:

1. Click on the **Sort Sequence** tab.
2. Click on a box under the **Sorted Columns** section and highlight the column to be removed from the sort sequence of the layout.
3. Click on the **Remove Item** button.
4. Click **Apply** to see the change in the grayed out view of the layout.
5. Click **OK** to remove the sort and review the results with the sorting and subtotaling removed from the layout.
6. Review the layout with sorting and subtotaling removed.
Customizing the Display (cont.)

Add Multiple Sort / Subtotal Selections

On the Sort Sequence tab in the Settings box:

1. Click on the **Sort Sequence** tab.

2. Click on the box to select and highlight one or more columns listed under *Unsorted Columns* (left side) that need to be included in the sort sequence of the layout.

3. Click on the **Add Item** button.

4. Review the columns added under the *Sorted Columns* section on the right.

5. As needed, click in the **Sort Direction** field to change the direction of the sort (ascending and descending) for each column displayed under the *Sorted Columns* section.
6. Click **Apply** to see the change in the grayed out view of the layout.

7. Click the **OK** button to add the sorting and subtotaling for the selected values.

8. Review the sorting changes made to the layout.
Customizing the Display (cont.)

Change Sort Order (Primary Sort, Secondary Sort, etc.)

On the Sort Sequence tab in the Settings box:

1. Click on the Sort Sequence tab.
2. If more than one column is displayed under Sorted Columns, click on the box to select the column name that needs to be moved in the sort order (from a secondary to primary sort in this example).
3. Use the Up and Down buttons at the bottom of the Sorted Columns section to move the highlighted column name up or down the list which changes the sort order (moved up in this example).
Customizing the Display (cont.)

4. Click **Apply** to see the changes in the grayed out view of the layout.

5. Click **OK** to display the sort order changes in the layout.

6. Review the sorting changes made to the layout.
Change Columns that Calculate Totals in the Layout

On the Calculation tab in the Settings box:

1. Click on the Calculation tab.

2. Review the list of Column Names on the left side of the box that are available to show calculated totals at the bottom of the layout.

3. **To remove the automatic subtotaling** that happens when sorting by column headings, click on the checkbox beside **Display Intermediate results for Sorted Columns** to deselect this defaulted option.

4. Use the drop-down in the Calculation column to choose other options for calculating subtotals as needed.

   **Note:** Remember that simply clicking on a column heading will sort and subtotal on that column heading. The Calculation function is for providing Total rows for the columns that can provide a total amount for the layout.

5. Click **Apply** to see the changes in the grayed out view of the layout.

6. Click **OK** to display the subtotals added in the layout.
Customizing the Display (cont.)

Change Other Display Options in the Layout

On the Display tab in the Settings box:

1. Click on the **Display** tab.
2. Review the display options available for the layout such as number of displayed rows, number of displayed columns and options for grid lines and adjust as needed.
3. Click **Apply** to see the changes in the grayed out view of the layout.
4. Click **OK** to display the rows and columns selected for the layout.
Using Version A and B

Version A is the official version and is the only version that is in the workflow process for board reporting. Version B can be used to create different budget scenarios. This section reviews how to move between the two versions and other options available in the Copy/Swap Version button.

Note: For Position Layouts, Version A will have data prepopulated in New Budget Year fields based upon Current Year numbers. Version B will NOT have this prepopulated information.

Moving Between Versions

1. Observe the Version currently chosen (default is Version A – the official version for board reporting).

   Note: Both the radio button selected for a Version and the Version listed in some column headings is an indicator of which Version you are using at the current time.

2. To switch between layouts, simply select the radio button beside the Version desired (in this example going from A to B).
Using Version A and B (cont.)

3. Review the results and note that the columns like the New Budget Column reference Budget version (in this example now in B).

Copying or Swapping Versions

1. Observe the Version currently chosen (default is Version A – the official version for board reporting).

   Note: Both the radio button selected for a Version and the Version listed in some column headings is an indicator of which Version you are using at the current time.

2. To copy or swap between Version A and B, click on the Copy/Swap Version button (upper right corner of screen).
3. In the resulting Copy/Swap Version dialog box, choose an option as outlined below:
   
   - To Copy Version A to Version B, click in the first check box.
     
     *Note:* The copy function will copy the layout from Version A into the Version B as a starting point to work on scenarios in Version B.
   
   - To Swap Version A with Version B, click in the second checkbox.
     
     *Note:* The swap function makes Version A becomes Version B and Version B becomes Version A – the versions “swap” layouts. This is helpful if you have been working in Version B and now want that to become Version A or want to reset Version A to the original state if you have not used Version B yet.

4. Click **OK**.

5. In the Warning dialog box, read the message indicating you are about to overwrite or swap the Versions and click on the radio button for Yes (or No if this is not your intention).
6. Review the results show that Version A copied into Version B OR Version A swapped with Version B or vice-versa (in this example, Version A with budget data already input was copied into Version B).

7. Remember to click the **Save** in Version A and B as desired to save any copying or swapping of data in the layout versions.
Saving and Messages

1. Periodically and before Version A is pulled up in the Workflow process, be sure to save as follows:

   - In layouts for Projections, Budget Modifications, and Budget Development: Non-Position, click on the **Save** button to perform edits on the data entered and save the data.
   
   - In the layout for Budget Development: Position, use one of the **TWO** options for saving that are available:
     
     - **Save Only** - to save budget data entered for future work - this save does not perform any system generated edits and does not calculate fringes.
     
     - **Calculate and Save** - to calculate fringes, perform edits on the budget data entered, and save the data – **Calculate and Save** must be used in conjunction with Workflow.
2. Review the messages and note the following about saving:
   - Multiple lines of messages will display at the top of the screen for each edit step in the Save process.
   - Look for the message \textbf{Data was saved} indicating the data was saved successfully—this message may not be last.
   - Ignore other green messages and just look for the “Data is saved” message—others provide no meaningful information.
   - Review other types of messages per examples in the next step.
3. In addition, review messages for any Warning Messages or Error Messages as follows:

- **Warning messages** have a yellow exclamation point triangle icon and indicate that you should read the message and make any necessary adjustments. This message is not a hard stop error and does not require action.

- **Error messages** have a red stop sign icon and indicate that this edit is a hard “stop” error. Action is required to correct the error before the data can be saved successfully.
Exiting the Budget Tool Layouts

**Note:** If you do not close the window of a layout properly, you will lock the layout for approximately 30 minutes. Turning “On” pop-up blockers for the Duke@Work site, may cause the window to not close properly. Be sure to allow pop-ups for Duke@Work.

1. To properly exit a layout and avoid locking yourself (or others) from working in the layout, follow the guidelines outlined below:
   - Be sure to save any data as needed before exiting the layout.
   - **When exiting a layout, click on the X icon in the upper right corner to close the window and watch for the Net ID Services small window that indicates the page is closing.**

2. As another tip while working in a layout, use your web browser’s Refresh button OR use the Save button in the layout often – this will prevent the required Duke@Work Net ID Services login from “timing out” after 30 minutes of no activity.

**Note:** Moving around the layout and using the planning functions may not register as activity. If the Duke@Work Net ID authentication times out, then you will NOT be able to exit properly and you will lock the data for approximately 30 minutes.
3. If you receive a Warning Message similar to the one above, you have locked the layout and must wait approximately 30 minutes for the data to unlock.