KSU Budget Online Proof Process

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Please direct questions to:
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Overview

Approved Budget users now have the option to make your own budget changes in the budget system. We are hoping this will make things easier, as you will no longer have to write out all your changes on a hard copy of the position listing.

Please keep in mind this is an optional change – we are still more than happy to enter your changes for you if you prefer to still write them out for us. If you do not have access and want it, please let the Budget Office know and they will schedule training for you and get you access.

We will let you know when the system is available for you to make changes. We will set a deadline for first proofs. After the deadline, we will lock you out so we can do final balancing before calculating allocations.

Important Details

Please add a new row each time you go into a position to make changes. Ensure that the FTE and the salary/OOE amounts match on the Budget Line and Funding Line tabs before saving.

Benefits will not update automatically. If you are trying to balance and make a change that impacts benefit amounts, please let your contact in the budget office know and he/she can run the process to update benefits on your lines.

We encourage the use of Trans notes to remind yourself why you are making a change – they come in very handy if you are ever questioned as to why you did something.

Run the appropriate reports to check your balances, once you are finished making changes.

If you need to make changes other than those you have access to, let your budget contact person know. We can still make those for you.

Do not hesitate to give us a call or shoot us an email if you have issues or questions!
Path

To access the Online Budget Proof, you will log into HRIS. The path is:

KSU Annual Budget > Budget Line/Funding Area

This will bring you to a search page. The Fiscal Year will default in. You can search for a position by any of the parameters listed.

This is the search page for all your positions. There are not separate search pages for each type of position like there is in the Online Entry Area.

Once you click search, it will either bring up the position you requested, or bring up a list of positions that meet the criteria you entered.
Budgeted Position Information Tabs

Each position has several tabs that hold all the information for that position. The type of position it is determines which tabs are available for that position, and what information can be changed on each tab.

Budget Line tab:

Add a row using the “+” box in the top right. Then the other red-circled fields will become available for entry.

If you want to take a position off the budget, you simply need to click the button by “Inactive” and save. You do not need to make any other changes (i.e. take the salary to $0).

Please do not change the position number (“Pos”). This needs to match the Budget Line number in most cases, and should not be changed.
Note that the “Unc Bw Rate” and “Mid Bw Rate” must be recalculated by the user any time the “Salary” amount is changed. To get the amount, take the new Salary divided by 26 for 12-month positions, or 20 for 9-month positions. You only have to type the new amount in the “Unc Bw Rate” field – you can then make the “Mid Bw Rate” field $0.

The Service Date relates to the employee filling the position – if the position is vacant this field should be blank. This is the date used for benefits.

*Budget Line – USS is the same as Unclassified, except there are no biweekly rate fields.*

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If you want to take a position off the budget, you simply need to click the button by “Inactive” and save. You do not need to make any other changes (i.e. take the salary to $0).

The USS/Unclassified indicator (“N/U”) should default in according to the jobcode (“JC”). Please note, you only have update ability on unclassified pooled lines, and a budget line should never be changed from unclassified to USS, or vice versa.
Once a row is added (usually on the “Budget Line” tab) the red-circled fields will become available for entry. Please update funding, adding or deleting funding rows as needed, keeping the following in mind:

- All General Use funding rows must have projects entered on them, so we can download the amounts to FIS in the summer.
- Restricted Use funding rows are not required to have a project, but you will have to manually enter the PCA if a project is not entered. If you intend to copy budget funding to payroll funding during Online Entry in May/June, you must have projects on all funding lines.
- The Fund will default in from the Source.
- The PCA will default in from the Project (if there is one).
- The sum of the FTE on all funding rows must total the FTE shown on the Budget Line panel. The FTE will determine the salary amount on each funding line.
- If there is no FTE on the Budget Line panel (i.e. some pooled positions, student lines and OOE lines) then the Salary amount will be enterable. The sum of the Salary on all funding rows must total the Salary shown on the Budget Line panel.
Employee tab:

Once a row is added (usually on the “Budget Line” tab) the red-circled fields will become available for entry, depending on the position type.

The name field will be enterable on Unclassified regular positions. If you change the name, it will erase the Empl ID. The Empl ID should pull through from HRIS the next time we update transactions.

If you want to make a position vacant, simply delete the name and leave it blank.

The Orig Hire Date is the first date an employee started at K-State. The Service Date is on the Budget Line panel.

Only Unclassified faculty positions should have Tenure Status as anything other than Non Elig. They can have “Earning” or “Tenured”.
Benefit Coverage tab:

Once a row is added (usually on the “Budget Line” tab) the red-circled fields will become available for entry, depending on the position type.

This is where you can change the benefits calculated on a position. Keep in mind, if a position is vacant, it should have single GHI on it – not family or Healthy Kids. If a position does not have FTE, it should not have any GHI calculated on it.
Line Notes tab:

This is where you can enter line notes. You can add and delete them as necessary using the “+” and “-“ buttons in the top right corner. Keep in mind these are the notes that will print on the budget. If you need to delete a line note, please use the “-“ button instead of just deleting the text out. Also, please ensure the “Seq#” always starts with 1 and goes in order.
Transaction Note tab:

Transaction notes are ones you make to yourself as a reminder of why you made the changes you did on a position. They are very helpful when you are later going back trying to figure out what changed and why.
Adding New Budget Lines

If you need to add a new unclassified pooled, student or OOE line, click the “Add a New Value” tab. It defaults in the Fiscal Year, and indicates you want a NEW Budget Line – do not change anything on this page. Hit the “Add” button and it will take you in to create a new line.

The page looks a little different when you first go in because it doesn’t yet know what type of position you want to add.
First – click the button to indicate the type of position you would like to set up. You should only be setting up OOE, Pooled, or Student positions this way. HRIS positions will have to be pulled through to the budget; Joint positions should only be set up by the Budget Office staff.

Leave the position box (“POS”) blank – it will automatically assign a number once you save the position.

Next – Department ID (“Dpt”) – this is the department where you want the position to show up on the budget.

JobCode (“JC”) – this is the jobcode on the position. For Unclassified and USS, please use the appropriate HRIS jobcode. For student lines, please use 035000. OOE lines do not need a jobcode.

USS/Unclassified indicator (“N/U”)

- “U” for Unclassified and Student positions
- “N” for USS positions
- OOE positions do not need an indicator.
Once you have the aforementioned data filled in, click “Enter”, and the page will reset.

Go ahead and fill in the remaining information on all the tabs as needed for the position you are setting up. Once you press save, it will give you the new budgeted position number.

Notes and Reminders

✓ Remember to change/add the biweekly rate whenever you are changing the salary on an unclassified position or pooled line.
✓ Remember to add retirement (REGNT = regents or KPERS = KPERS) when you create a new position/pooled line.
✓ Remember to add the Month’s Basis (MB) on the Employee panel – either 9-month or 12-month – when you create a new position/pooled line.
✓ Do not add FTE to the funding panel if there is no FTE on the position.
✓ Do not add FTE to pooled positions.
✓ Do not use more than one line of funding on a USS pooled position – you will have to set up a new, pooled USS position for each line of funding.
✓ Do put $0 on a position or a line of funding – inactivate the position or delete that line of funding instead.