

UIITS Budget Construction Application Overview

Fiscal Year 2018 (July 2017 – June 2018)

I. Introduction

Each spring, the UIITS Finance Office distributes a Budget Construction Toolkit to all sub-account managers to facilitate the creation of the budget for the following fiscal year. For the FY 2018 budget, the Finance Office is once again using our web-based application to capture budget requests from managers, directors, and AVPs.

II. Instructions

The application has two main features: *budget entry* and *budget reports*.

Budget Entry:

From the main menu of the application, select the Budget Entry link. The first Budget Entry screen lists all acct/subs for which you are the manager or delegate and that require budget entry.

You can click on a sub-account to edit or view the detailed budget information for it. You can sort any field by clicking on the field name itself. Additionally, there is a filter bar with drop down boxes at the top of the page where you can narrow your list.

Included fields:

Manager	Person in subdivision responsible for activity on the acct/sub.
Delegate	Person to which the manager delegates budget entry responsibility.
Chart	Chart of accounts for the given acct/sub. All UIITS acct/subs are UA.
Account	Self-explanatory.
Account Name	Self-explanatory.
Sub-account	Self-explanatory.
Name	Name of the sub-account.
Report Code	A code that aggregates acct/subs by UIITS subdivision.
Updated	Indicates the last day and time that someone made changes to the requested budget of the given acct/sub.
Updated By	The user ID of the person who last made the changes.
Status	Status of the budget entry process for the given acct/sub.
Notes	Self-explanatory.

If you do not see all of your subdivision’s acct/subs, see other subdivisions’ acct/subs, or if you would like to designate a different delegate for entry, please contact Dessa Evans (oacrane@indiana.edu).

Once you click on a sub-account, the second Budget Entry screen will appear. This screen lists object codes that have had a budget or financial activity in the current or previous year.

Included fields not described above:

Object Code	A four-digit code classification that we assign to transactions to help identify the type of transaction—income, expense, asset, liability, or fund balance.
Description	Object code description.
Object Level	A summary code for a range of object codes having similar financial activity.
Sub-object Code	Creates a finer distinction within a particular object code on a specific acct/sub.
Prior Year Cleared	Actual activity for this object/sub-object for the entire prior year (FY 16)
Current Year Budget	CY (FY 17) Base Budget. Note: Carryforwards or any other one-time budget adjustments are not included.
Current Year Cleared	Actual activity for the given object/sub-object since July 1 of this fiscal year (FY 17)
Budget Request	The amount of budget you are requesting on a given acct/sub/object for FY 18.
Notes	Notes related to the budget request, such as explanations for significant increases or decreases.

Enter your requested budget for each object code in the Budget Request column. Add notes that would be of benefit to you, your director or AVP, or the Finance Office. **Notes are very helpful, and more information is better than less.**

To add an object code not listed, scroll to the bottom where it says "Select object to add" and then click the link for "Click here to add more rows."

As you complete entries, please use the "Save/Recalculate" button to save your changes. If you are done with all entries, click the "Finalize" button. If you need to make changes after you have finalized the budget, please contact uitsfin@indiana.edu.

Note: If you would like to export your data to Excel for further review and analysis, please click the "Export to Excel" button.

Personnel:

The Budget Construction Application will not allow you to enter data in the appointed personnel object codes 2000, 2400, 2480, and 2500 or the benefits object codes 56xx and 57xx. These are summarized budgets based on the information shown at the bottom of the screen.

The application also shows personnel information based on base account allocations for each person. If you would like to adjust the personnel account distribution or in removing a vacant position, please contact Tara Slaughter (tbslaugh@indiana.edu). Please note that if the changes involve transferring a person to another manager's budget, the Finance Office will need approval from that manager prior to making the requested changes.

Summary Section:

At the top of the Budget Entry page is a section summarizing the following:

- Prior year actual income, expense, and subsidy
- Current year budget income, expense, and subsidy
- Budget requested income, expense, subsidy, and potential giveback

Budget Reports:

From the main menu of the application, select the Budget Reports link. This screen allows you to customize a summary report for your subdivision, as well as filter the results.

Report Type options include:

- Summary
- Summary By Manager
- Summary By Account
- Summary By Account/Sub-account and Manager
- Budget Realignment Detail
- Budget Realignment Summary by Sub-account

Note: If you would like to export your data to Excel for further review and analysis, please click the “Export to Excel” button.