


# BUDGET INPUT FEATURE: TIPS & TRICKS


- + Each form will have a Point of View bar to select the COA values, if you click on the new members in blue hyperlink, **ALWAYS** make sure that you click  to update the data on that form

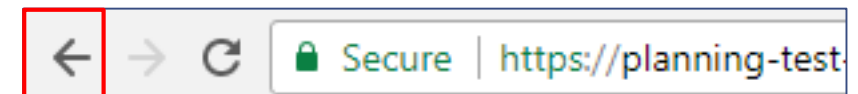
Years FY21	Scenario Budget	Version Working	LEntity The College of New Jersey
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- + The refresh button will update the form to whatever was saved on the previous Save

Actions ▾	Save	Refresh
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- + The  button within your browser **DOES NOT** take you to the previous click or page. Please avoid selecting the browser back button.



# Budget Input **Select the Correct Category**

## Select a Member

Category  
"100 - Instruction - General"

Search Category

Category	All Categories	Instruction
All Categories	Default Category	✓ 100 - Instruction - General
	Instruction	105 - Instruction - Fall
	Research	110 - Instruction - Winter
	Non-Instruction	115 - Instruction - Spring
	Auxiliary Category	120 - Instruction - Summer I
		125 - Instruction - Summer II
		130 - Instruction - Summer ...

Members    Category > All Categories > Instruction > 100 - Instruction - General

## Select a Member

Category  
"315 - Academic Support"

Search Category

Category	All Categories	315 - Academic Support
All Categories	Default Category	320 - Student Services
	Instruction	325 - Institutional Services
	Research	330 - Operation & Maintenan...
	Non-Instruction	335 - Mandatory Transfers P...
	Auxiliary Category	345 - Depreciation
		350 - Fundraising
		355 - Program Services
		360 - Restricted Funds Cont...
		400 - GASB 75 OPEB Expense

Members    Category > All Categories > Non-Instruction > 315 - Academic Support

To input budget and review reports, be sure to select the correct Category value. In general, all Schools use Category 100- Instruction. Academic but non-instructional uses 315- Academic Support. Administration uses Category 325- Institutional Services.

# BUDGET INPUT Org in Rows \_Programs

**Budget Overview** Multi-Year Budgeting Strategic Request Input Forecasting Supplemental Budget Req Reports Approvals

Be sure to select Save after you've edited the budget

Budget Input\_Org In Rows\_Programs Select the appropriate Point of View (COA)

Org\_UserVar: School of Education | LEntity: The College of New Jersey | Fund: 100000 - General Fund | Category: 100 - Instruction - General

Input budget at the correct Category level:  
 100- Instruction  
 315- Academic Support  
 325- Institutional Services

	Loaded Data	Total Plan Element	Inputted Data		Total Before Adjustments
			FY21	FY22	
			FY21	FY22	
		Remaining Budget \$	Budget	Budget	
	YearTotal	YearTotal	YearTotal	YearTotal	
604260 - Duplicating	0	0	0	0	
604280 - Supplies	0	0	0	0	
	0	206	206		
	0	1236	1236		1
		-18			
		-84			
	91	709	800		
	0	0	0	0	
	0	0	0	0	
	0	0	0	0	
	299	-299	0	0	
	980	3020	4000		4
	1188	-1188	0	0	
	2685	-2188	497	0	
604290 - Procurement Card Charges	0	0	0	0	

Greyed out cells cannot be edited

White cells are available for input

The Budget Input Form (Org in Rows\_Programs form allows you to see multiple Organizations and associated Accounts & Programs (pending security access). Budget can be inputted in white cells. Click save once budget entry is complete.

# DATA ENTRY ADD COMMENTS

## Comment directly on the form:

- + Scroll to farthest right column on the form in which you are inputting
- + Enter comments directly into cell that corresponds with the row. Select Save. The cell will turn yellow indicating text has been entered.

The screenshot shows a data entry interface with a table and a modal dialog. The table has columns for 'Inputted Data', 'FY22', 'Budget', and 'Comments'. The 'Inputted Data' column contains program names and codes. The 'FY22' and 'Budget' columns are empty. The 'Comments' column contains the text 'add comments here'. A modal dialog box is open over the table, containing a text input field with the placeholder 'add comments here' and two buttons: 'Save' and 'Cancel'. The 'Save' button is circled in red. A yellow highlight is visible in the 'Comments' column of the table, indicating that text has been entered.

	Inputted Data	FY22	Budget	Comments
1410 - Off-Site Graduate Programs	0000 - Default Program			
1405 - Support for Teacher Education Programs	0000 - Default Program			
1400 - Dean of Education	2335 - Regional Training Center			
1403 - Elementary & Early Childhood Education	0000 - Default Program			
1404 - Special Education Language & Literacy	0000 - Default Program			
	2300 - Career & Community Studies			
	2315 - SELL Contracts			
1405 - Support for Teacher Education Programs	0000 - Default Program			
1410 - Off-Site Graduate Programs	0000 - Default Program			

- + If there are no attachments and you are finished entering budget data and comments, save the form.



# DATA ENTRY **ADD ATTACHMENTS**

## Add attachments directly to the Budget Input form:

- + Select Data. Under 'Details' select the paperclip. Choose file. Upload.

The screenshot illustrates the steps to add attachments to the Budget Input form. It shows the 'Data' tab selected in the top navigation bar. In the 'Details' section, the paperclip icon is circled in red. The 'Attachments' panel shows a 'Choose File' button with an arrow pointing to it, and 'Upload' and 'Close' buttons with an arrow pointing to 'Upload'. A second screenshot shows the attachment 'Agenda for 2.26.21.docx' by user 'mayhank1' with 'Upload' and 'Close' buttons, and a callout box pointing to the 'Close' button with the text 'Once the attachment is uploaded, select Close'.

- + When finished entering budget data, adding comments and uploading attachments, save the form.

The screenshot shows the 'Actions' bar at the bottom of the form, with 'Actions', 'Save', and 'Refresh' buttons. The 'Save' button is circled in blue.