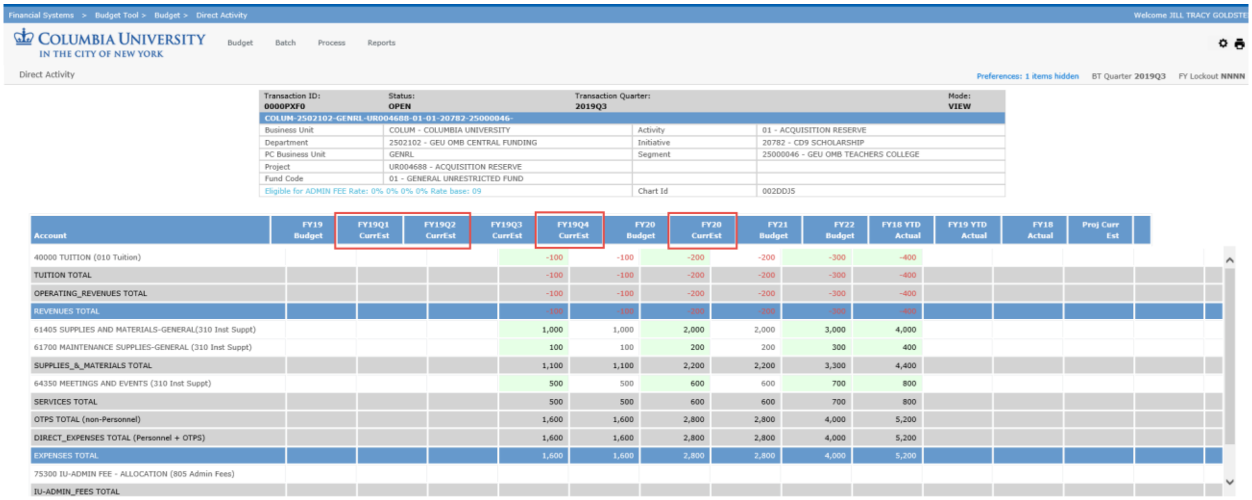
This job aid describes enhancements to the Budget Tool effective December 2018.

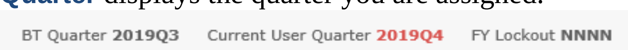
Direct Activity Layout Changes

The Direct Activity Report has been changed to provide a more modern look and feel. Notable changes include columns for different quarters and updated amounts highlighted in green.



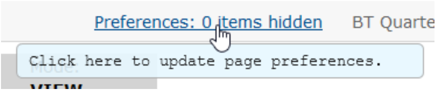
Accessing a Future Quarter

After you log into the **Budget Tool** the **Current User Quarter** displays the quarter you are assigned.

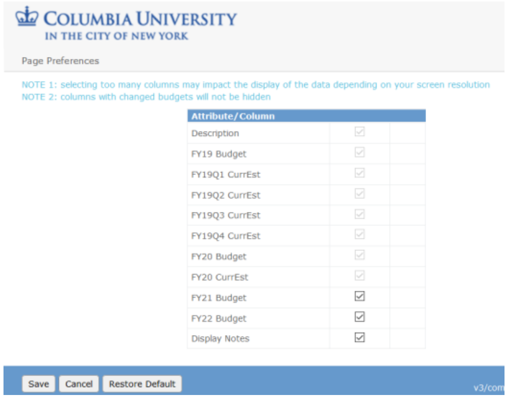


Working with the Preferences Link

1. On any budget screen, click the **Preferences** link from the top right to select to display or hide attributes or columns



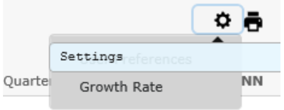
The Page Preferences screen appears.



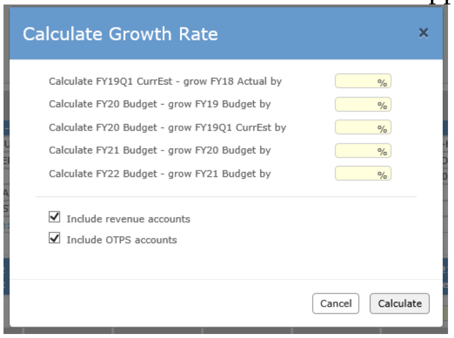
2. Select or de-select **Attribute/Columns** to display or hide then click **Save** or click **Restore Default**.

Setting Growth Rates

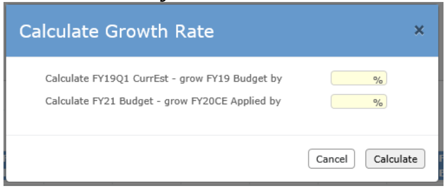
1. Click on the **Settings** icon and **Growth Rate** from the top right of the screen to calculate growth rates to grow your budgets for future periods.



The Calculate Growth Rate screen appears.



Direct Activity Calculate Growth Rate screen.



Payroll Worksheet Calculate Growth Rate Screen.

2. Enter the desired Percentages and click **Calculate**.

Downloading via Batch by Department Node

When downloading via Batch, the Chart String Selector screen displays the Department Node as query option for Direct Activity or Transfers.

Select **Batch** > **Download Direct Activity** or **Download Transfers**.

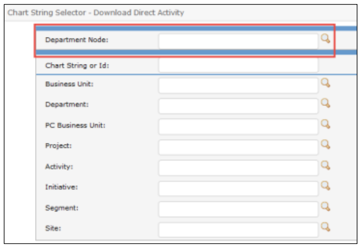


Chart String Selector for downloading Direct Activity.

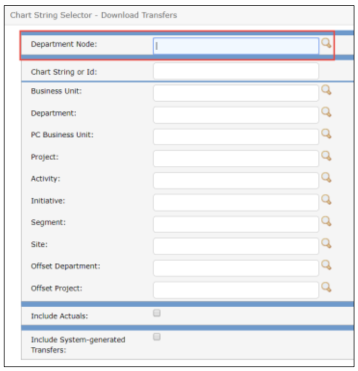
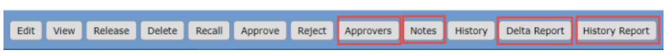


Chart String Selector for downloading Transfers.

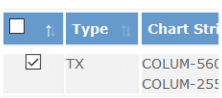
New Buttons

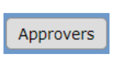


You have access to new buttons (highlighted above) with functionality described below.

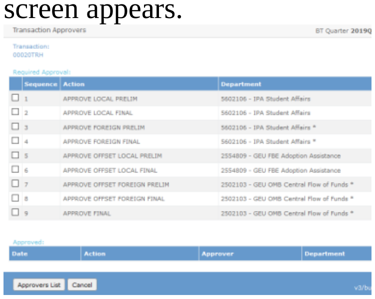
Viewing Required Approvals and Approvers

1. Select the check box for the Worklist item.



2. Click the **Approvers** 

button from the bottom of the screen. The Required Approval screen appears.



	Sequence	Action	Department
☐	1	APPROVE LOCAL PRELIM	5602106 - IPA Student Affairs
☐	2	APPROVE LOCAL FINAL	5602106 - IPA Student Affairs
☐	3	APPROVE FOREIGN PRELIM	5602106 - IPA Student Affairs *
☐	4	APPROVE FOREIGN FINAL	5602106 - IPA Student Affairs *
☐	5	APPROVE OFFSET LOCAL PRELIM	2554809 - GEU FBE Adoption Assistance
☐	6	APPROVE OFFSET LOCAL FINAL	2554809 - GEU FBE Adoption Assistance
☐	7	APPROVE OFFSET FOREIGN PRELIM	2502103 - GEU OMB Central Flow of Funds *
☐	8	APPROVE OFFSET FOREIGN FINAL	2502103 - GEU OMB Central Flow of Funds *
☐	9	APPROVE FINAL	2502103 - GEU OMB Central Flow of Funds *

Approved:

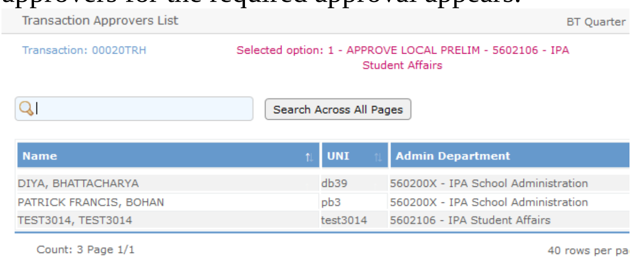
Date	Action	Approver	Department

Approvers List | Cancel

3. Select the check box for the Required Approval item.

	Sequence	Action
☑	1	APPROVE LOCAL PRELIM
☐	2	APPROVE LOCAL FINAL

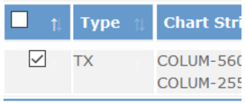
4. Click the **Approvers List** button. The list of approvers for the required approval appears.

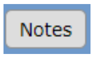


Name	UNI	Admin Department
DIYA, BHATTACHARYA	db39	560200X - IPA School Administration
PATRICK FRANCIS, BOHAN	pb3	560200X - IPA School Administration
TEST3014, TEST3014	test3014	5602106 - IPA Student Affairs

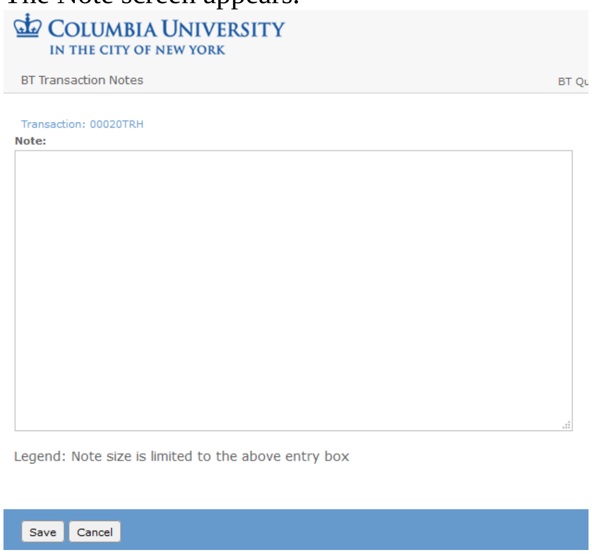
Adding Notes

1. Select the check box for the Worklist item.



2. Click the **Notes** 

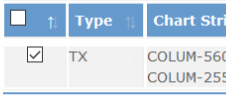
button from the bottom of the screen.
3. Click the **Add** button from the bottom of the screen. The Note screen appears.



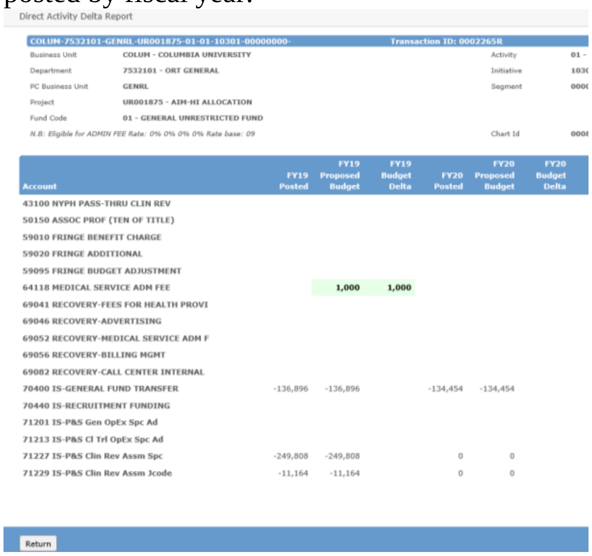
4. Type your notes and click the **Save** button. Once a note has been saved, the Notes column will display a "Y".

Viewing Upcoming Budget Change Details

1. Select the check box for the Worklist item.

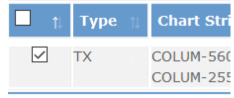


2. Click the **Delta Report** Delta Report button from the bottom of the screen. The Delta Report screen appears. Items highlighted in green are changes posted by fiscal year.



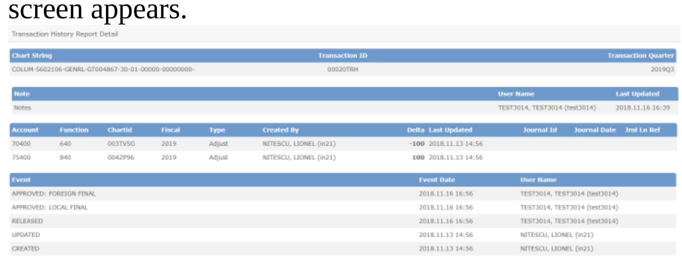
Viewing Historical Budget Change Details

1. Select the check box for the Worklist item.



2. Click the **History Report** History Report button from the bottom of the screen. The Transaction History Report screen appears which displays a list of transactions.

3. Select the check box for the Transaction item.
4. Click the **Display Detail** button at the bottom of the screen. The Transaction History Report Detail screen appears.



Getting Help

Please contact the Finance Service Center

http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now

https://columbia.service-now.com

Or, you can contact the Service Center by phone: (212) 854-2122