

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.

Account	FY19 Budget	FY19Q1 CurrEst	FY19Q2 CurrEst	FY19Q3 CurrEst	FY19Q4 CurrEst	FY20 Budget	FY20 CurrEst	FY21 Budget	FY22 Budget	FY18 YTD Actual	FY19 YTD Actual	FY18 Actual	Proj Curr Est
40000 TUITION (310 Tuition)					-100	-100	-200	-200	-300		-400		
TUITION TOTAL					-100	-100	-200	-200	-300		-400		
OPERATING_REVENUES TOTAL					-100	-100	-200	-200	-300		-400		
REVENUES TOTAL					100	100	200	200	300		400		
61405 SUPPLIES AND MATERIALS-GENERAL(310 Inst Suppt)					1,000	1,000	2,000	2,000	3,000		4,000		
61700 MAINTENANCE SUPPLIES-GENERAL (310 Inst Suppt)					100	100	200	200	300		400		
SUPPLIES_A_MATERIALS TOTAL					1,100	1,100	2,200	2,200	3,300		4,400		
64350 MEETINGS AND EVENTS (310 Inst Suppt)					500	500	600	600	700		800		
SERVICES TOTAL					500	500	600	600	700		800		
OTPS TOTAL (non-Personnel)					1,600	1,600	2,800	2,800	4,000		5,200		
DIRECT_EXPENSES TOTAL (Personnel + OTPS)					1,600	1,600	2,800	2,800	4,000		5,200		
EXPENSES TOTAL					1,600	1,600	2,800	2,800	4,000		5,200		
75300 IU-ADMIN FEE - ALLOCATION (805 Admin Fees)													
IU-ADMIN_FEES TOTAL													

Accessing a Future Quarter

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

BT Quarter 2019Q3 Current User Quarter 2019Q4 FY Lockout NNNN

Working with the Preferences Link

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

Preferences: 0 items hidden BT Quarter
Click here to update page preferences.

The Page Preferences screen appears.

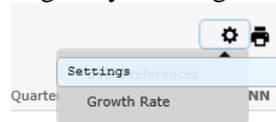
Attribute/Column	
Description	<input checked="" type="checkbox"/>
FY19 Budget	<input checked="" type="checkbox"/>
FY19Q1 CurrEst	<input checked="" type="checkbox"/>
FY19Q2 CurrEst	<input checked="" type="checkbox"/>
FY19Q3 CurrEst	<input checked="" type="checkbox"/>
FY19Q4 CurrEst	<input checked="" type="checkbox"/>
FY20 Budget	<input checked="" type="checkbox"/>
FY20 CurrEst	<input checked="" type="checkbox"/>
FY21 Budget	<input checked="" type="checkbox"/>
FY22 Budget	<input checked="" type="checkbox"/>
Display Notes	<input checked="" type="checkbox"/>

Save Cancel Restore Default v3/cont

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

Setting Growth Rates

- 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.

Calculate Growth Rate

Calculate FY19Q1 CurrEst - grow FY18 Actual by %

Calculate FY20 Budget - grow FY19 Budget by %

Calculate FY20 Budget - grow FY19Q1 CurrEst by %

Calculate FY21 Budget - grow FY20 Budget by %

Calculate FY22 Budget - grow FY21 Budget by %

Include revenue accounts

Include OTPS accounts

Cancel Calculate

Direct Activity Calculate Growth Rate screen.

Calculate Growth Rate

Calculate FY19Q1 CurrEst - grow FY19 Budget by %

Calculate FY21 Budget - grow FY20CE Applied by %

Cancel Calculate

Payroll Worksheet Calculate Growth Rate Screen.

- 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.

<input type="checkbox"/>	Type	Chart Str
<input checked="" type="checkbox"/>	TX	COLUM-560 COLUM-255

2. Click the **Approvers** button from the bottom of the screen. The Required Approval screen appears.

Transaction Approvers BT Quarter 2019Q

Transaction: 00020TRH

Sequence	Action	Department
<input type="checkbox"/> 1	APPROVE LOCAL PRELIM	5602106 - IPA Student Affairs
<input type="checkbox"/> 2	APPROVE LOCAL FINAL	5602106 - IPA Student Affairs
<input type="checkbox"/> 3	APPROVE FOREIGN PRELIM	5602106 - IPA Student Affairs *
<input type="checkbox"/> 4	APPROVE FOREIGN FINAL	5602106 - IPA Student Affairs *
<input type="checkbox"/> 5	APPROVE OFFSET LOCAL PRELIM	2554809 - GEU FEE Adaption-Assistance
<input type="checkbox"/> 6	APPROVE OFFSET LOCAL FINAL	2554809 - GEU FEE Adaption-Assistance
<input type="checkbox"/> 7	APPROVE OFFSET FOREIGN PRELIM	2502103 - GEU OMB Central Flow of Funds *
<input type="checkbox"/> 8	APPROVE OFFSET FOREIGN FINAL	2502103 - GEU OMB Central Flow of Funds *
<input type="checkbox"/> 9	APPROVE FINAL	2502103 - GEU OMB Central Flow of Funds *

Date	Action	Approver	Department
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Approvers List Cancel

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

<input type="checkbox"/>	Sequence	Action
<input checked="" type="checkbox"/>	1	APPROVE LOCAL PRELIM
<input type="checkbox"/>	2	APPROVE LOCAL FINAL

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

Transaction Approvers List BT Quarter

Transaction: 00020TRH Selected option: 1 - APPROVE LOCAL PRELIM - 5602106 - IPA Student Affairs

Search Across All Pages

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

Count: 3 Page 1/1 40 rows per page

Adding Notes

1. Select the check box for the Worklist item.

<input type="checkbox"/>	Type	Chart Str
<input checked="" type="checkbox"/>	TX	COLUM-560 COLUM-255

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.

COLUMBIA UNIVERSITY
IN THE CITY OF NEW YORK

BT Transaction Notes BT QL

Transaction: 00020TRH

Note:

Legend: Note size is limited to the above entry box

Save Cancel

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.

<input type="checkbox"/>	Type	Chart Str
<input checked="" type="checkbox"/>	TX	COLUM-560 COLUM-255

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.

Direct Activity Delta Report

Transaction ID: 00022628

Account	FY19 Posted	FY19 Proposed Budget	FY19 Budget Delta	FY20 Posted	FY20 Proposed Budget	FY20 Budget Delta
43100 NYPH PASS-THRU CLIN REV						
50150 ASSOC PROF (TEN OF TITLE)						
59010 FRINGE BENEFIT CHARGE						
59020 FRINGE ADDITIONAL						
59095 FRINGE BUDGET ADJUSTMENT						
64118 MEDICAL SERVICE ADM FEE			1,000			1,000
69041 RECOVERY-FEES FOR HEALTH PROVI						
69046 RECOVERY-ADVERTISING						
69052 RECOVERY-MEDICAL SERVICE ADM F						
69056 RECOVERY-BILLING NGMT						
69082 RECOVERY-CALL CENTER INTERNAL						
70400 IS-GENERAL FUND TRANSFER	-136,896	-136,896		-134,454	-134,454	
70440 IS-RECRUITMENT FUNDING						
71201 IS-PBS Gen OpEx Spc Ad						
71213 IS-PBS Cl Trl OpEx Spc Ad						
71227 IS-PBS Clin Rev Assm Spc	-249,808	-249,808		0	0	
71229 IS-PBS Clin Rev Assm 3code	-11,164	-11,164		0	0	

Return

Viewing Historical Budget Change Details

1. Select the check box for the Worklist item.

<input type="checkbox"/>	Type	Chart Str
<input checked="" type="checkbox"/>	TX	COLUM-560 COLUM-255

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.

Transaction History Report

Transaction ID: 00022628

Transaction	Type Desc.	Description
00022628	INDIRECT ACTIVITY (TRANSFERS)	Test Transfer 75400/70400

Transaction History Report Detail

Transaction ID: 00022628

Account	Function	ChartId	Fiscal	Type	Created By	Delta	Last Updated	Journal Id	Journal Date	Int En Ref
70400	640	003VSG	2019	Adjust	NITESCU, LIONEL (n21)	-100	2018.11.13 14:56			
75400	840	004ZPH	2019	Adjust	NITESCU, LIONEL (n21)	100	2018.11.13 14:56			

Event	Event Date	User Name
APPROVED: FOREIGN FINAL	2018.11.16 16:56	TEST3014, TEST3014 (nnc3014)
APPROVED: LOCAL FINAL	2018.11.16 16:56	TEST3014, TEST3014 (nnc3014)
RELEASED	2018.11.16 16:56	TEST3014, TEST3014 (nnc3014)
UPDATED	2018.11.13 14:56	NITESCU, LIONEL (n21)
CREATED	2018.11.13 14:56	NITESCU, LIONEL (n21)

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