

BudgetPak User Guide

Overview

This Getting Started Guide contains instructions for how to complete your FY2017 Budget.

BudgetPak supports several levels of users. In your budget there may be information you cannot view and operations you cannot perform because the scope and role assigned to you does not allow it. The permissions you are granted depend upon your BudgetPak “role,” which the Administrator has assigned to you based on your budget responsibilities within your department. Each user’s role is associated with his or her user login profile.

Your BudgetPak Administrator is Tom Hammar, Assistant Director of Budgeting. If you have any questions you can reach him at x2850 or hammart1@tcnj.edu. You can also call the Office of the Treasurer at x2186 for assistance.

About Your FY2017 Budget

In BudgetPak your department(s), their general ledger accounts (“accounts”), and baseline FY2017 budget have already been set up for you. You will be accessing each account and reviewing/modifying its annual budget amount.

The FY2014, 2015, and 2016 Original Budget, Revised Budget and Actuals and the FY2017 Baseline Budget have been loaded into BudgetPak. The instructions below describe how to view reports, so that you can use these numbers as a guide to creating this year’s budget. You can also obtain current and historical budget and actual information from [Web Reports](#).

Logging In to BudgetPak

To open BudgetPak:

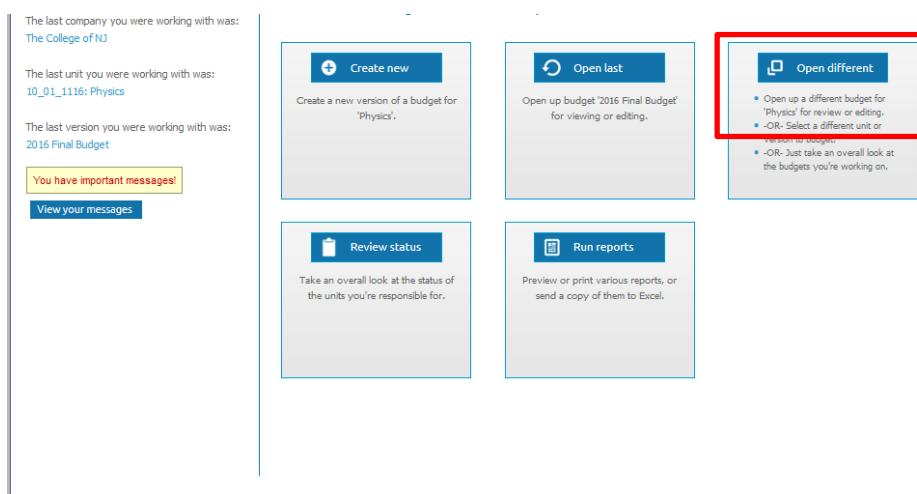
1. Locate the [BudgetPak link](#) on the Office of the Treasurer webpage at <http://treasurer.tcnj.edu/> under Tools & Logins. The BudgetPak Log In box displays.
2. In the first box, enter the username you use to access your computer and email.
3. In the second box, enter the password that was assigned to you.
4. Click the **Log In** button.
5. Change your password when prompted if it is your first time logging in to BudgetPak.

Creating Your FY2017 Budget

NOTE: All Budgets were started for you using FY2016 original budget as the FY2017 baseline.

From the Main Menu:

1. Select **Open Different** to view and modify the budget.



2. In the **Select a unit** panel of the box that displays, select the department or unit you want to budget (use the drop-down menu or click the 'Select unit' button to view the list of options).

Select a unit

Select the unit you would like to work with: 22_01_1228_E1248: Hunt Select unit...

The last version you were working with was: 2016 Actual

You may select another version below, or: Resume viewing

Messages

Select a version

Here are the different versions you can view and work with for unit 'Hunterdon CTHQP': Save descriptions

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments				
FY2015-R-38	2015 Actual	AD	2015 Actual							View		History
FY2015-R-39	2015 Revised Budget	AD	2015 Revised Budget							View		History
FY2015-R-40	2015 Original Budget	AD	2015 Original Budget							View		History
FY2016-D-44	2016 Final Budget		2016 Final Budget	✔	☑	6/11/2015 12:00 PM	Van Nostra...			View		History
FY2016-R-47	2016 Original Budget	AD	2016 Original Budget							(No data available)		History
FY2016-R-48	2016 Revised Budget	AD	2016 Revised Budget							(No data available)		History
FY2016-R-49	2016 Actual	AD	2016 Actual							(No data available)		History
FY2017-D-51	2017 Baseline Budget	B	2017 Baseline Budget							View	Copy	History
FY2017-D-53	2017 Draft 1		2017 Draft 1							Edit		History
FY2017-D-54	2017 Draft 2		2017 Draft 2							Edit		History
FY2017-D-55	2017 Final Budget		2017 Final Budget		☐					Edit		History

Status key:
✔ Approved
☑ Signed off (but not yet approved)
● Complete (but not yet signed off)

Version type key:
● Started (but not yet completed)
● Needs rollout
● Locked for editing

Version notes key:
 Read-only versions (you may only view)
 Read-write versions (you may view and edit)
 Signoff versions (you may view and edit)
 AD: This version contains account data only (no employee or asset detail)
 B: Baseline version

3. In the **Select a Version** panel, click **Edit** in the FY2017 Final Budget row.

Select a unit

Select the unit you would like to work with: 22_01_1228_E1248: Hunt Select unit...

The last version you were working with was: 2014 Actuals

You may select another version below, or: Resume viewing

Messages

Select a version

Here are the different versions you can view and work with for unit 'Hunterdon CTHQP': Save descriptions

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments			
FY2015-R-38	2015 Actual	AD	2015 Actual							View	History
FY2015-R-39	2015 Revised Budget	AD	2015 Revised Budget							View	History
FY2015-R-40	2015 Original Budget	AD	2015 Original Budget							View	History
FY2016-D-44	2016 Final Budget		2016 Final Budget	✔	<input checked="" type="checkbox"/>	6/11/2015 12:00 PM	Van Nostra...			View	History
FY2016-R-47	2016 Original Budget	AD	2016 Original Budget						(No data available)		History
FY2016-R-48	2016 Revised Budget	AD	2016 Revised Budget						(No data available)		History
FY2016-R-49	2016 Actual	AD	2016 Actual						(No data available)		History
FY2017-D-51	2017 Baseline Budget	B	2017 Baseline Budget							View	Copy
FY2017-D-53	2017 Draft 1		2017 Draft 1							Edit	History
FY2017-D-54	2017 Draft 2		2017 Draft 2							Edit	History
FY2017-D-55	2017 Final Budget		2017 Final Budget		<input type="checkbox"/>					Edit	History

Status key:
✔ Approved ⊙ Started (but not yet completed) ✔ Signed off (but not yet approved) ⊙ Needs rollup ✔ Complete (but not yet signed off) ⊙ Locked for editing

Version type key:
 Read-only versions (you may only view) Read-write versions (you may view and edit) Signoff versions (you may view and edit)

Version notes key:
 AD: This version contains account data only (no employee or asset detail) B: Baseline version

4. This brings you to the Navigation Window for the budget.

Navigation
ActionPaks
What if...?
View/edit drivers
Across the board (all line items)
Monthly spreading (all line items)
Notes
Files

Currently viewing

Company: The College of NJ

Unit: 10_01_1116: Physics

Version: 2017 Final Budget

Your budget's status is: Started

Headcount/FTE

As of 6/30/2016: 11.50

Additions: -

Reductions: -

As of 6/30/2017: 11.50

Version comparison

Expense line items

	Total:	Your difference:
2015 Actual:	\$1,567,990	+\$58,652 +4%
2016 Revised Budget:	\$1,669,352	(\$42,710) -3%
2017 Baseline Reference:	\$1,626,642	
2017 Final Budget:	\$1,626,642	

Your budget: ⊙ You are here ✔ Reviewed Actions Go to section...

Stack

- Headcount & Salaries
- Headcount Review
- New Hires
- Salary Increases
- Compensation Review \$1,555,857

Salary Expenses

- Across the Board
- Adjunct Payment \$0
- Overload Payment \$0

Student Aid Salary

- Across the Board
- Student Aid Payroll \$14,400

Travel & Reception

- Across the Board
- Official Reception \$0

Section

Internal Charges (Pool)

- Across the Board
- Graphics Design \$50
- Photocopies \$3,750
- Express Shipping \$100
- Departmental Postage \$175

NOTE: In BudgetPak each column in the Navigation Window is called a “stack,” and each box is called a “section.” If at any time you wish to return to this window, click Navigation at the top left of the window.

NOTE: The Version Comparison box at the top shows the budget amounts for each version and the variances between versions. FY2017 Final will change as you make modifications. The variance from FY2017 Baseline Reference to FY2017 Final should be zero when you are done unless you submitted an ActionPak request to fund a strategic priority or have reallocated existing funds to or from the budget.

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Reviewing Headcount & Salaries

If you have Headcount (employees) in your unit and if you are authorized to review Headcount & Salaries, you will see a stack called **Headcount & Salaries** in your Navigation window.

1. Click the top section **Headcount Review** to make sure that you have the correct list of employees for your unit. If not, please contact your BudgetPak Administrator.

NOTE: In this section, you are verifying the current headcount, including vacancies. You do not need to verify salaries.

Step 1

Review your current headcount below. Is the list complete and correct?

Yes If the details are not correct, please contact your administrator.
 No Note: Please consider at this point ONLY your CURRENT headcount. We will ask about new hires later.

Current employees

Current employees as of 2/19/2015: Filter Recalc Show/hide columns...

Employee class	Employee ID	Name	Headcour / FTE	Allocation	Net headcount	Title	Hire date	Current salary	Employee notes
AFT	207829		1.000	100 %	1.000	Associate Professor 26	7/1/2014		
AFT	203967		1.000	100 %	1.000	Professor	7/1/2014		
AFT	210670		1.000	100 %	1.000	Assistant Professor	7/1/2014		
AFT	207830		1.000	100 %	1.000	Associate Professor 26	7/1/2014		
AFT	210241		1.000	100 %	1.000	Assistant Professor	7/1/2014		
AFT	209363		1.000	100 %	1.000	Professor	7/1/2014		
AFT	203578		1.000	100 %	1.000	Professor	7/1/2014		
AFT	208283		0.750	100 %	0.750	Assistant Professor	7/1/2014		
AFT	559735		1.000	100 %	1.000	Assistant Professor	7/1/2014		
AFT	203291		1.000	100 %	1.000	Professor	7/1/2014		
AFT	208921		1.000	100 %	1.000	Professor	7/1/2014		
CWA	202658		1.000	100 %	1.000	Princ Clerk Stenographer	7/1/2014		
			12.750		12.750			\$1,121,196	

- a. In **Steps 2, and 3**, answer “No”. Enter notes in the Employee Notes field to add commentary.

Navigation ActionPaks What if...? View/edit drivers Across the board (all line items) Monthly spreading (all line items) Notes Files

Currently viewing

Company: The College of NJ
 Unit: 10_01_1116: Physic
 Version: 2017 Final Budget
 Your budget's status is: Not started

Headcount/FTE

As of 6/30/2016: -
 Additions: -
 Reductions: -
 As of 6/30/2017: -

Version comparison

Expense line items

2015 Actual: -
 2016 Revised Budget: -
 2016 Final Budget with ne...
 2017 Final Budget: -

This section: Headcount Review

Note: Section totals are not meaningful on this page.

This unit: Physics

Total: \$1,567,990
 Your difference: (\$1,567,990) -
 \$1,669,352 (\$1,669,352) -
 \$1,669,352 (\$1,669,352) -

FYI You are currently in 'view only' mode. You may view this budget, but you may not make any changes.

Headcount review

Please review your current headcount and answer the questions step by step. You can always come back later and change your answers. Close Next

Step 1

Review your current headcount below. Is the list complete and correct?

Yes If the details are not correct, please contact your administrator.
 No Note: Please consider at this point ONLY your CURRENT headcount. We will ask about new hires later.

Step 2

Are any of your current headcount going to be leaving permanently, for any reason?

Yes
 No

Step 3

Are any of your current headcount going on leave of absence?

Yes
 No

Current employees

EE2017 employees: Filter Recalc Show/hide columns...

You can display additional columns or hide current columns by clicking the **Show/hide columns...** button.

- b. Click **Save** to save your entries then **Close** to return to the Navigation page.

2. Skip the New Hires and Salary Increases sections. They are centrally managed by the Office of the Treasurer in collaboration with HR.
3. Review all **Salary and Fringe Benefit** detail in the next section, **Compensation Review**. No changes are necessary. Fringe benefits are centrally managed by the Office of the Treasurer. Click each tab to review account totals. Click **Close**.

Line Item	Amount
1 Officers And Employees	\$0
2 Faculty	\$0
3 Fringe Benefits	\$0

4. In each of the non-salary stacks, you have the option to review the accounts and make changes either **Across the Board** (for all accounts in the stack at once) or for each account individually.
5. To make changes **Across the Board**, click the **Across the Board section** at the top of the stack; the Make across-the-board changes window displays. If you wish to review and modify each account individually, skip to step 12.

Navigation	ActionPaks	What if...?	View/edit drivers	Across the board (all line items)	Monthly spreading (all line items)	Notes	Files
Currently viewing							
Company:	The College of NJ						
Unit:	10_01_1116: Physics						
Version:	2017 Final Budget						
Your budget's status is:	Started						
Headcount/FTE				Version comparison			
As of 6/30/2016: 11.50				Expense line items			
Additions: -				2015 Actual: \$57,086			
Reductions: -				2016 Revised Budget: \$56,385			
As of 6/30/2017: 11.50				2017 Baseline Reference: \$56,385			
				2017 Final Budget: \$56,385			
				This stack:		This unit:	
				Internal Charges (Pool)		Physics	
				Total: \$57,086		Total: \$1,567,990	
				Your difference: (\$701) -1%		Your difference: +\$58,652 +4%	
						Total: \$1,669,352	
						Your difference: (\$42,710) -3%	
						Total: \$1,626,642	

Make across-the-board changes to Internal Charges (Pool)

Instead of stepping through each line item in Across the Board one at a time, you may make changes to all line items at once.

Note that some line items are government-mandated or are predetermined by corporate headquarters. You may change discretionary line items only.

Step 1

How would you like to make across-the-board changes?

- Budget a percent increase / decrease
- Budget a total \$ increase / decrease
- Budget by \$ per head

Your budgeted headcount as of 6/30/2017 is 11.50

Line items

Internal Charges (Pool) line items:

Line item	2017 Baseline Reference	% Increase	\$ Increase	\$ per head	2017 Final Budget
Graphics Design	\$50	0.00 %	\$0	\$4	\$50
Photocopies	\$3,750	0.00 %	\$0	\$326	\$3,750
Express Shipping	\$100	0.00 %	\$0	\$9	\$100
Departmental Postage	\$175	0.00 %	\$0	\$15	\$175
Telephone Line Charges	\$3,984	0.00 %	\$0	\$346	\$3,984

6. In **Step 1** of the Make across-the-board changes window, select the option you would like to use.
 - a. Budget a percent increase/decrease will apply the specified percentage to each line item shown in the Line items box on the right side of the window.
 - b. Budget a total \$ increase/decrease will allocate the specified dollar amount to each line item so the total increase/decrease in the stack is the specified dollar amount.
 - c. Budget by \$ per head will allocate the specified dollar amount per head to each line item so the total dollar amount per head in the stack is the specified dollar amount per head.

NOTE: The Budget by \$ per head may be used but is not recommended by the Office of the Treasurer.

7. When you select a method in **Step 1**, the **Step 2** box will appear. In the **Step 2** box, select the option you would like to use to apply the across the board change.

Make across-the-board changes to Internal Charges (Pool)

Instead of stepping through each line item in Across the Board one at a time, you may make changes to all line items at once.

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Step 1
 How would you like to make across-the-board changes?
 Budget a percent increase / decrease
 Budget a total \$ increase / decrease
 Budget by \$ per head
 Your budgeted headcount as of 6/30/2016 is 12.75

Step 2
 How would you like to handle percent changes?
 Change every discretionary line item by the same percent
 Change every discretionary line item (EXCEPT SOME) by the same amount
 Change line items individually

Line items
 Internal Charges (Pool) line items:

Line Item	2015 Original Budget	% Increase	\$ increase	\$ per head	2016 Final Budget
Graphics Design	\$50	0.00 %	\$0	\$4	\$50
Photocopies	\$3,750	0.00 %	\$0	\$294	\$3,750
Express Shipping	\$100	0.00 %	\$0	\$8	\$100
Departmental Postage	\$175	0.00 %	\$0	\$14	\$175
Telephone Line Charges	\$3,984	0.00 %	\$0	\$312	\$3,984
Telephone Toll Charges	\$150	0.00 %	\$0	\$12	\$150
Media Center Charges	\$200	0.00 %	\$0	\$16	\$200
General Supplies	\$35,326	0.00 %	\$0	\$2,771	\$35,326
Procurement Card Charges	\$0	0.00 %	\$0	\$0	\$0
Office Supplies-Office Max	\$3,500	0.00 %	\$0	\$275	\$3,500
Equipment Rental	\$650	0.00 %	\$0	\$51	\$650
Equipment Repairs	\$8,500	0.00 %	\$0	\$667	\$8,500
Total	\$56,385	0.00 %	\$0	\$4,422	\$56,385

8. If you selected Budget a percent increase/decrease in **Step 1**:
- Change every discretionary line item by the same percent will allow you to enter a percentage to increase or decrease all line items.

Make across-the-board changes to Internal Charges (Pool)

Instead of stepping through each line item in Across the Board one at a time, you may make changes to all line items at once.

Note that some line items are government-mandated or are predetermined by corporate headquarters. You may change discretionary line items only.

Step 1
 How would you like to make across-the-board changes?
 Budget a percent increase / decrease
 Budget a total \$ increase / decrease
 Budget by \$ per head
 Your budgeted headcount as of 6/30/2016 is 12.75

Step 2
 How would you like to handle percent changes?
 Change every discretionary line item by the same percent
 Change every discretionary line item (EXCEPT SOME) by the same amount
 Change line items individually

Line items
 Internal Charges (Pool) line items:

Line Item	2015 Original Budget	% Increase	\$ increase	\$ per head	2016 Final Budget
Graphics Design	\$50	0.00 %	\$0	\$4	\$50
Photocopies	\$3,750	0.00 %	\$0	\$294	\$3,750
Express Shipping	\$100	0.00 %	\$0	\$8	\$100
Departmental Postage	\$175	0.00 %	\$0	\$14	\$175
Telephone Line Charges	\$3,984	0.00 %	\$0	\$312	\$3,984
Telephone Toll Charges	\$150	0.00 %	\$0	\$12	\$150
Media Center Charges	\$200	0.00 %	\$0	\$16	\$200
General Supplies	\$35,326	0.00 %	\$0	\$2,771	\$35,326
Procurement Card Charges	\$0	0.00 %	\$0	\$0	\$0
Office Supplies-Office Max	\$3,500	0.00 %	\$0	\$275	\$3,500
Equipment Rental	\$650	0.00 %	\$0	\$51	\$650
Equipment Repairs	\$8,500	0.00 %	\$0	\$667	\$8,500
Total	\$56,385	0.00 %	\$0	\$4,422	\$56,385

- Change every discretionary line item (EXCEPT SOME) by the same amount will allow you to check/uncheck line items in the Apply std increase column and enter a percentage to increase or decrease the selected line items. The percentage entered will only be applied to the checked line items.

Make across-the-board changes to Internal Charges (Pool)

Instead of stepping through each line item in Across the Board one at a time, you may make changes to all line items at once.

Note that some line items are government-mandated or are predetermined by corporate headquarters. You may change discretionary line items only.

Step 1
 How would you like to make across-the-board changes?
 Budget a percent increase / decrease
 Budget a total \$ increase / decrease
 Budget by \$ per head
 Your budgeted headcount as of 6/30/2016 is 12.75

Step 2
 How would you like to handle percent changes?
 Change every discretionary line item by the same percent
 Change every discretionary line item (EXCEPT SOME) by the same amount
 Change line items individually

Line items
 Internal Charges (Pool) line items: Recalc Show/hide columns...

Line item	2015 Original Budget	Apply std increase	% increase	\$ increase	\$ per head	2016 Final Budget
Graphics Design	\$5	<input type="checkbox"/>	0.00 %	\$0	\$4	\$50
Photocopies	\$3,750	<input checked="" type="checkbox"/>	0.00 %	\$0	\$294	\$3,750
Express Shipping	\$100	<input checked="" type="checkbox"/>	0.00 %	\$0	\$8	\$100
Departmental Postage	\$175	<input checked="" type="checkbox"/>	0.00 %	\$0	\$14	\$175
Telephone Line Charges	\$3,984	<input checked="" type="checkbox"/>	0.00 %	\$0	\$312	\$3,984
Telephone Toll Charges	\$150	<input checked="" type="checkbox"/>	0.00 %	\$0	\$12	\$150
Media Center Charges	\$200	<input type="checkbox"/>	0.00 %	\$0	\$16	\$200
General Supplies	\$35,326	<input checked="" type="checkbox"/>	0.00 %	\$0	\$2,771	\$35,326
Procurement Card Charges	\$0	<input checked="" type="checkbox"/>	0.00 %	\$0	\$0	\$0
Office Supplies-Office Max	\$3,500	<input checked="" type="checkbox"/>	0.00 %	\$0	\$275	\$3,500
Equipment Rental	\$650	<input checked="" type="checkbox"/>	0.00 %	\$0	\$51	\$650
Equipment Repairs	\$8,500	<input checked="" type="checkbox"/>	0.00 %	\$0	\$667	\$8,500
Total	\$56,388	<input type="checkbox"/>	0.00 %	\$0	\$4,422	\$56,385

- c. Change line items individually will allow you to manually enter a percent increase/decrease in the % increase column for each line item. To enter a percent increase/decrease, double click the % increase box for the line item and type in the desired percentage.

Make across-the-board changes to Internal Charges (Pool)

Instead of stepping through each line item in Across the Board one at a time, you may make changes to all line items at once.

Note that some line items are government-mandated or are predetermined by corporate headquarters. You may change discretionary line items only.

Step 1
 How would you like to make across-the-board changes?
 Budget a percent increase / decrease
 Budget a total \$ increase / decrease
 Budget by \$ per head
 Your budgeted headcount as of 6/30/2016 is 12.75

Step 2
 How would you like to handle percent changes?
 Change every discretionary line item by the same percent
 Change every discretionary line item (EXCEPT SOME) by the same amount
 Change line items individually

Line items
 Internal Charges (Pool) line items: Recalc Show/hide columns...

Line item	2015 Original Budget	% increase	\$ increase	\$ per head	2016 Final Budget
Graphics Design	\$5	5.00 %	\$3	\$4	\$53
Photocopies	\$3,750	0.00 %	\$0	\$294	\$3,750
Express Shipping	\$100	0.00 %	\$0	\$8	\$100
Departmental Postage	\$175	0.00 %	\$0	\$14	\$175
Telephone Line Charges	\$3,984	0.00 %	\$0	\$312	\$3,984
Telephone Toll Charges	\$150	0.00 %	\$0	\$12	\$150
Media Center Charges	\$200	0.00 %	\$0	\$16	\$200
General Supplies	\$35,326	0.00 %	\$0	\$2,771	\$35,326
Procurement Card Charges	\$0	0.00 %	\$0	\$0	\$0
Office Supplies-Office Max	\$3,500	0.00 %	\$0	\$275	\$3,500
Equipment Rental	\$650	0.00 %	\$0	\$51	\$650
Equipment Repairs	\$8,500	0.00 %	\$0	\$667	\$8,500
Total	\$56,385	0.00 %	\$3	\$4,423	\$56,388

9. If you selected Budget a total \$ increase/decrease in **Step 1**:
- Apply the total \$ amount across all line items will allow you to enter a dollar amount to increase or decrease all line items. BudgetPak will automatically allocate the total dollar change specified to each line item.
 - Apply the total \$ amount across all line items EXCEPT SOME will allow you to check/uncheck line items in the Apply std increase column and enter a dollar

amount to increase or decrease the selected line items. The total dollar amount entered will only be applied to the checked line items.

Make across-the-board changes to Internal Charges (Pool)

Discard Close Save Next Back Skip

Skip this page if you've changed your mind, and want to be guided through these line items one at a time.

You have unsaved changes!

Instead of stepping through each line item in Across the Board one at a time, you may make changes to all line items at once.

Note that some line items are government-mandated or are predetermined by corporate headquarters. You may change discretionary line items only.

Step 1

How would you like to make across-the-board changes?

Budget a percent increase / decrease

Budget a total \$ increase / decrease

Budget by \$ per head

Your budgeted headcount as of 6/30/2016 is 12.75

Line items

Internal Charges (Pool) line items:

Line Item	2015 Original Budget	Apply std increase	% Increase	\$ increase	\$ per head	2016 Final Budget
Graphics Design	\$50	<input checked="" type="checkbox"/>	0.89 %	\$0	\$4	\$50
Photocopies	\$3,750	<input checked="" type="checkbox"/>	0.89 %	\$33	\$297	\$3,783
Express Shipping	\$100	<input checked="" type="checkbox"/>	0.89 %	\$1	\$8	\$101
Departmental Postage	\$175	<input checked="" type="checkbox"/>	0.89 %	\$2	\$14	\$177
Telephone Line Charges	\$3,984	<input checked="" type="checkbox"/>	0.89 %	\$35	\$315	\$4,019
Telephone Toll Charges	\$150	<input checked="" type="checkbox"/>	0.89 %	\$1	\$12	\$151
Media Center Charges	\$200	<input checked="" type="checkbox"/>	0.89 %	\$2	\$16	\$202
General Supplies	\$35,326	<input checked="" type="checkbox"/>	0.89 %	\$313	\$2,795	\$35,639
Procurement Card Charges	\$0	<input checked="" type="checkbox"/>	0.00 %	\$0	\$0	\$0
Office Supplies-Office Max	\$3,500	<input checked="" type="checkbox"/>	0.89 %	\$31	\$277	\$3,531
Equipment Rental	\$650	<input checked="" type="checkbox"/>	0.89 %	\$6	\$51	\$656
Equipment Repairs	\$8,500	<input checked="" type="checkbox"/>	0.89 %	\$75	\$673	\$8,575
Total	\$56,385	<input type="checkbox"/>	0.89 %	\$500	\$4,462	\$56,885

- c. Change line items individually will allow you to manually enter a dollar increase/decrease in the \$ increase column for each line item. To enter an increase/decrease, double click the \$ increase box for the line item and type in the desired dollar amount.

Make across-the-board changes to Internal Charges (Pool)

Discard Close Save Next Back Skip

Skip this page if you've changed your mind, and want to be guided through these line items one at a time.

You have unsaved changes!

Instead of stepping through each line item in Across the Board one at a time, you may make changes to all line items at once.

Note that some line items are government-mandated or are predetermined by corporate headquarters. You may change discretionary line items only.

Step 1

How would you like to make across-the-board changes?

Budget a percent increase / decrease

Budget a total \$ increase / decrease

Budget by \$ per head

Your budgeted headcount as of 6/30/2016 is 12.75

Line items

Internal Charges (Pool) line items:

Line Item	2015 Original Budget	% Increase	\$ increase	\$ per head	2016 Final Budget
Graphics Design	\$50	0.00 %	\$0	\$4	\$50
Photocopies	\$3,750	0.00 %	\$0	\$294	\$3,750
Express Shipping	\$100	0.00 %	\$0	\$8	\$100
Departmental Postage	\$175	0.00 %	\$0	\$14	\$175
Telephone Line Charges	\$3,984	0.00 %	\$0	\$312	\$3,984
Telephone Toll Charges	\$150	0.00 %	\$0	\$12	\$150
Media Center Charges	\$200	0.00 %	\$0	\$16	\$200
General Supplies	\$35,326	0.00 %	\$0	\$2,771	\$35,326
Procurement Card Charges	\$0	0.00 %	\$0	\$0	\$0
Office Supplies-Office Max	\$3,500	0.00 %	\$275	\$275	\$3,500
Equipment Rental	\$650	15.38 %	\$100	\$59	\$750
Equipment Repairs	\$8,500	0.00 %	\$0	\$667	\$8,500
Total	\$56,385	0.18 %	\$100	\$4,430	\$56,485

NOTE: To enter a decrease, enter the percentage or dollar amount with a minus sign (i.e. -5.00% or -\$500). To apply manual changes made in the Line items table, click the Recalc button at the top right of the table. If at any point you need to clear the changes made in **Across the Board**, click the **Discard** button.

NOTE: The Version Comparison box will show both the total budget and variances for the stack you are viewing as well as the total budget for the unit. Note the 2015 Actual in comparison to the 2017 Baseline Reference as an indicator that reallocations may be necessary in the 2017 Final Budget to better align the budget to actual spending. You should also review the current FY2016 actuals from the Web Report for the unit and factor any variances from budget to actual into the 2017 Final Budget request (keeping in mind the variance between the 2017 Baseline Reference and 2017 Final Versions must be zero unless you submitted an ActionPak).

10. Click **Save** (located just below the Version Comparison box) to save your changes. Click **Close** (located just below the Version Comparison box) to return to the Navigation window and select the next stack you wish to review/edit.
11. If you use the **Across the Board** method, **SKIP to Item # 17 and repeat the process for the other Stacks and Sections.**
12. To view and make changes to each account individually, click any section (account) you want to budget. The Account window displays.
13. In **Step 1** of the Annual total for [account name] window, an annual amount based on last year's budget is displayed. You can either accept this amount or use one of the other methods (**by annual amount, by percent increase, by per head, by line item detail, by driver x rate, by advanced modeler**) to change the annual amount.

Student Aid Payroll

← Back | Discard | Close | Save | → Next

Step 1

Student Aid Payroll 51810 ⓘ

Please select one of the budget methods below and use it to designate the annual amount for this line item.

Select budget methods from here:	By annual amount	Enter annual amount here:	\$14,400
	By percent increase	2017 Baseline Reference annual amount:	\$14,400
		Enter your percent increase/decrease:	0.00 %
		2017 Final Budget annual amount:	\$14,400
	By per head	By annual amount per head	
		Your budgeted headcount:	As of 6/30/2017 11.50
		Enter your annual amount per head here:	\$1,252.17
		This year's annual amount:	\$14,400
		Last year's annual amount was \$14,400. With the current headcount, this would be \$1,252 per head.	

Step 2 (optional)

Would you like to make a note about this line item? If so, enter your note here. It will be printed on some PL reports. You may enter up to 1023 characters.

Edit | Import notes from prior budgets

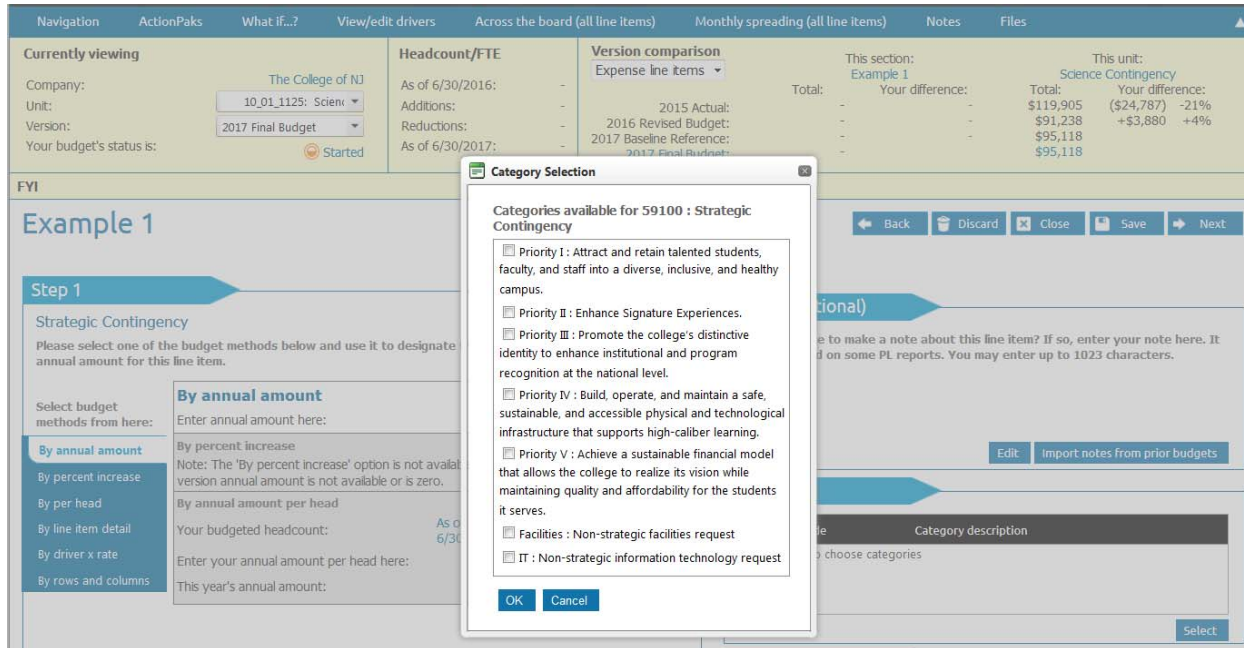
Category

Category code	Category description
Click "Select" to choose categories	

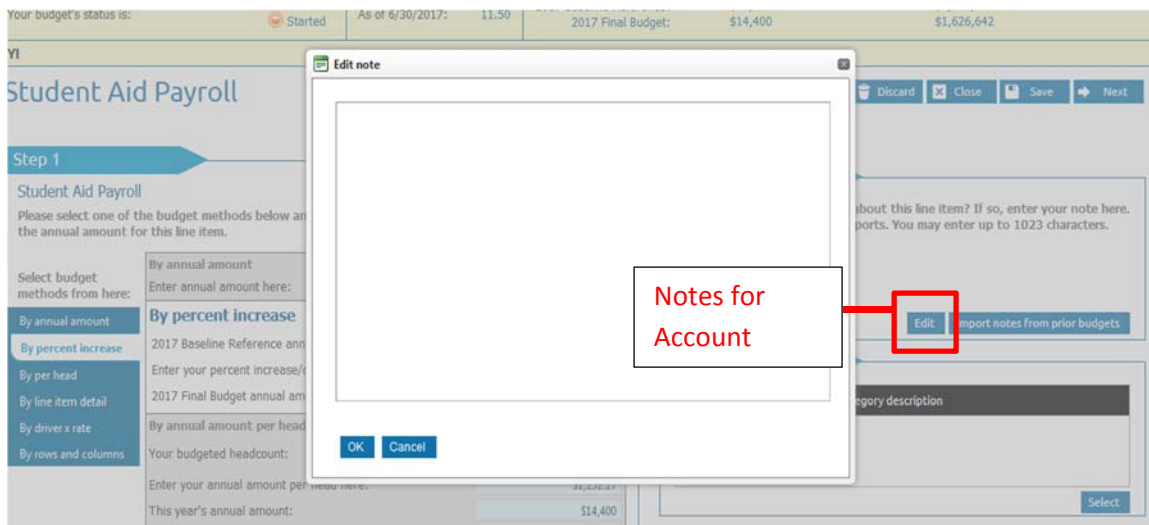
Select

Strategic Priorities

14. In **Step 2**, enter any relevant comments about the account and its annual budget amount in the text box provided. Click Select in the Category box to link the account to a Strategic Priority, if applicable. The Facilities and IT non-strategic categories should only be used for ActionPaks.



- Indicate the Strategic Priority associated with a particular account. When a Strategic Priority has been selected, include a brief description of the budgetary item in the Notes section. Notes can be added on the account level or roll-up to all units.



Navigation ActionPaks What if...? View/edit drivers Across the board (all line items) Monthly spreading (all line items) **Notes** Files

Currently viewing
 Company: The College of NJ
 Unit: 10_01_1116: Physics
 Version: 2017 Final Budget
 Your budget's status is: Started

Headcount/FTE
 As of 6/30/2016: 11.50
 Additions: -
 Reductions: -
 As of 6/30/2017: 11.50

Version comparison
 Expense line items
 2015 Actual: \$11,358
 2016 Revised Budget: \$14,400
 2017 Baseline Reference: \$14,400
 2017 Final Budget: \$14,400

This section: Student Aid Payroll
 Total: \$11,358
 Your difference: +\$3,042 +27%

This unit: Physics
 Total: \$1,567,990
 Your difference: +\$58,652 +4%
 Total: \$1,669,352
 Your difference: (\$42,710) -3%
 Total: \$1,626,642
 Your difference: \$1,626,642

FYI This section has been Reviewed.

Notes Discard Close Save

Here you may read or enter notes about your budget. Depending on your user-privileges, you may edit only your notes or all notes.

Add

User	Unit	Last Edited	Rolldown to child units?	Note
No records to display.				

16. Supporting files can be attached in BudgetPak. Files can be attached for a single account, ActionPak or roll-up unit. BudgetPak has limited file storage, so please don't upload large data files.

Navigation ActionPaks What if...? View/edit drivers Across the board (all line items) Monthly spreading (all line items) **Notes** **Files**

Currently viewing
 Company: The College of NJ
 Unit: 10_01_1116: Physics
 Version: 2017 Final Budget
 Your budget's status is: Started

Headcount/FTE
 As of 6/30/2016: 11.50
 Additions: -
 Reductions: -
 As of 6/30/2017: 11.50

Version comparison
 Expense line items
 2015 Actual: \$11,358
 2016 Revised Budget: \$14,400
 2017 Baseline Reference: \$14,400
 2017 Final Budget: \$14,400

This section: Student Aid Payroll
 Total: \$11,358
 Your difference: +\$3,042 +27%

This unit: Physics
 Total: \$1,567,990
 Your difference: +\$58,652 +4%
 Total: \$1,669,352
 Your difference: (\$42,710) -3%
 Total: \$1,626,642
 Your difference: \$1,626,642

FYI This section has been Reviewed.

Files Discard Close Save

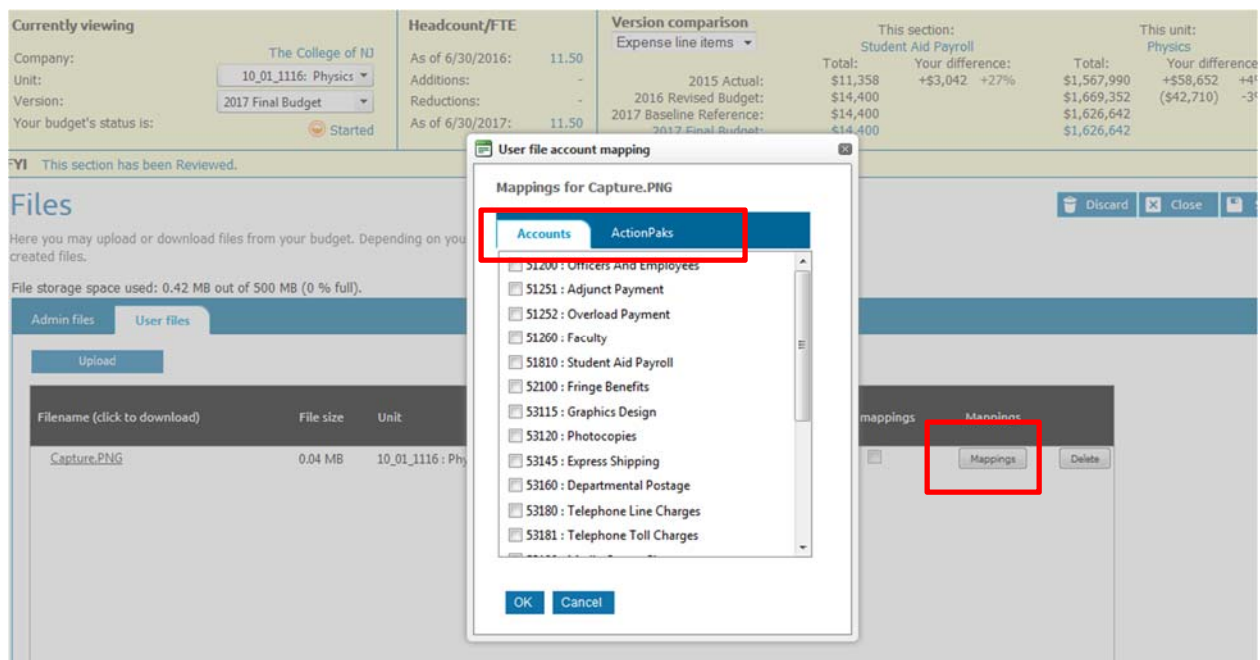
Here you may upload or download files from your budget. Depending on your user-privileges, you may manage only your files or all user created files.

File storage space used: 0.28 MB out of 500 MB (0 % full).

Admin files **User files** 2

Upload

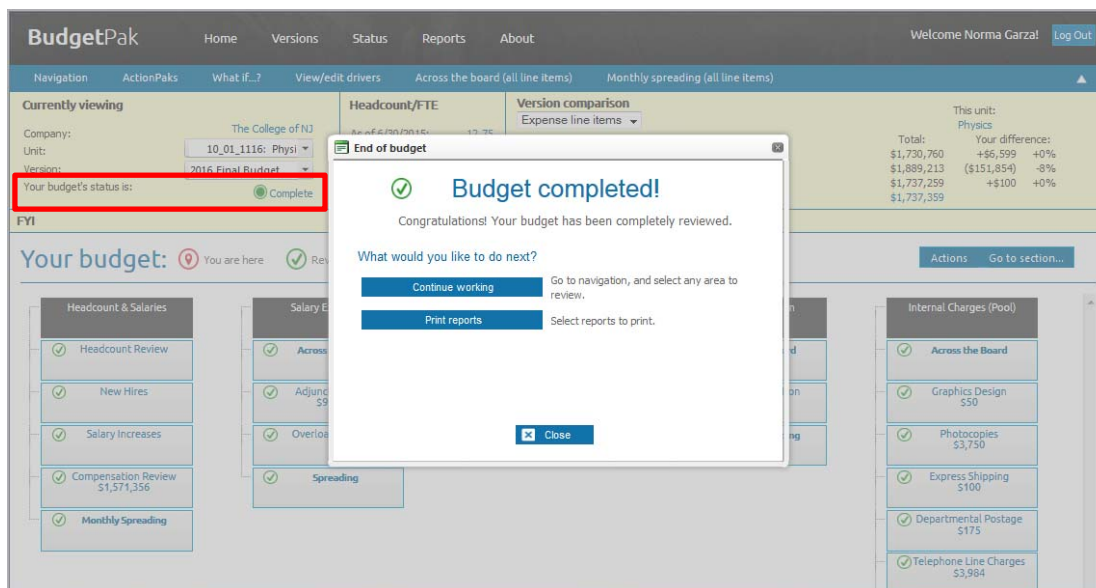
Filename (click to download)	File size	Unit	User	Rolldown to child units	Has mappings	Mappings
No records to display.						



17. Click **Save** (located just below the Version Comparison box) to save your changes.
18. Click **Close** to close the account window and return to the Navigation window; or, click **Next** to save the current value and move to the next account.
19. Repeat Steps 4 through 19 until all of your accounts have been populated with an annual budget amount.

NOTE: You may have some accounts that have pre-designated values that you cannot change, such as fringe benefits. You will still need to review these accounts in order to get the green check mark and complete your budget.

20. Once you have completed all the necessary steps (confirming headcount and answering all other headcount questions as “No”, completed **Across the Board** or individual review of all sections and stacks) all sections will have a green check mark. A Budget Completed pop up box will appear and the budget status will change to “Complete” with a green circle. From here you can select **Continue working** if you would like to enter ActionPaks or review an area, select **Print reports** if you would like to view reports for your budget, or **Close** if you are done with the budget.



ActionPaks – Funding Requests for Strategic Priorities

ActionPaks are an optional feature that you can use to budget for unit-specific initiatives, projects, or programs. Any amount entered into an ActionPak is additive to the amount already entered for that line item in your base budget. ActionPaks are used to request **new funding for projects and initiatives tied to [TCNJ's Strategic Plan](#)**.

ActionPaks must have a note or attachment describing the initiative and how it is explicitly linked to at least one of the strategic priorities from the Strategic Plan:

Priority I: Attract and retain talented students, faculty, and staff into a diverse, inclusive, and healthy campus.

Priority II: Enhance Signature Experiences

Priority III: Promote the college's distinctive identity to enhance institutional and program recognition at the national level.

Priority IV: Build, operate, and maintain a safe, sustainable, and accessible physical and technological infrastructure that supports high-caliber learning.

Priority V: Achieve a sustainable financial model that allows the college to realize its vision while maintaining quality and affordability for the students it serves.

The linkage to the strategic priorities must be noted in BudgetPak by assigning a Category to the ActionPak. There are two additional categories that may be selected for ActionPaks – Facilities and IT – which are to be used for facility maintenance and information technology upgrades/projects that are not strategic in nature.

1. Click **ActionPaks** in the blue navigation menu at the top of your screen. ActionPaks can be entered at any point in the budget entry process detailed in the section above.

2. Click the **Add ActionPak** button and enter a name for this ActionPak, and Click **OK**.

- Enter a code for this ActionPak. The code is required and needs to be a unique identifier within the unit.

ActionPak configuration

ActionPak budgeting allows you to develop a separate line item for an ActionPak, and then automatically merge it into your standard line item. You will need to designate which accounts make up the ActionPak.

Discard Close Save
You have unsaved changes!

Add ActionPak ActionPak name: Example 1
Delete ActionPak ActionPak code: 1
Rename ActionPak
Import ActionPaks

You may use these up/down buttons to change the order in which your ActionPaks appear.

Line items used in this ActionPak:

These line items currently make up this ActionPak. You may add more line items from the list of available ones at right. If you've mistakenly added a line item to the ActionPak, or want to remove one for any reason, you may do so, but you will lose any currently budgeted values for it.

Account number	Line item

Add or remove line items from the ActionPak:

Line items available for use in ActionPaks:

These are the list of line items that are available to become part of this ActionPak. You may select as many line items as you wish to include in the ActionPak by clicking the 'Add line item' button.

Account number	Line item
51230	Supp Part Time
52200	Speakers and Honorariums
54100	Travel - Faculty & Staff
54120	Academic Student Travel
54150	Official Reception
53115	Graphics Design
54000	Conference Ctr Charges
53200	General Supplies
53100	Operating Pool Transfers
59100	Strategic Contingency
53100	Computer Equipment

- Map the line item(s) to the ActionPak by selecting the line item in the Line items available for use in ActionPaks box on the right of the window and clicking the left arrow to add it to the ActionPak. The accounts selected will appear in the Line items used in this ActionPak box on the left of the window. Map all accounts that will be needed for the ActionPak.

BudgetPak Home Versions Status Reports About Welcome Norma Garza! Log Out

Navigation ActionPaks What if...? View/edit drivers Across the board (all line items) Monthly spreading (all line items)

Currently viewing Company: The College of NJ Unit: 10_01_1125: Scier Version: 2016 Final Budget Your budget's status is: Started

Headcount/FTE As of 6/30/2015: - Additions: - Reductions: - As of 6/30/2016: -

Version comparison Expense line items This unit: Science Contingency Total: \$124,262 Your difference: (\$29,144) -23% 2014 Actuals: \$95,118 2015 Original Budget: \$95,118 2016 Baseline Budget: \$95,118 2016 Final Budget: \$95,118

FYI

ActionPak configuration

ActionPak budgeting allows you to develop a separate line item for an ActionPak, and then automatically merge it into your standard line item. You will need to designate which accounts make up the ActionPak.

Discard Close Save
You have unsaved changes!

Add ActionPak ActionPak name: Example 1
Delete ActionPak ActionPak code: 1
Rename ActionPak
Import ActionPaks

You may use these up/down buttons to change the order in which your ActionPaks appear.

Line items used in this ActionPak:

These line items currently make up this ActionPak. You may add more line items from the list of available ones at right. If you've mistakenly added a line item to the ActionPak, or want to remove one for any reason, you may do so, but you will lose any currently budgeted values for it.

Account number	Line item
59100	Strategic Contingency

Add or remove line items from the ActionPak:

Line items available for use in ActionPaks:

These are the list of line items that are available to become part of this ActionPak. You may select as many line items as you wish to include in the ActionPak by clicking the 'Add line item' button.

Account number	Line item
51230	Supp Part Time
52200	Speakers and Honorariums
54100	Travel - Faculty & Staff
54120	Academic Student Travel
54150	Official Reception
53115	Graphics Design
54000	Conference Ctr Charges
53200	General Supplies
53100	Operating Pool Transfers

NOTE: A separate ActionPak must be entered for each unique initiative. Do not create one ActionPak for the total funding of all enhanced budget requests for the unit.

- Click **Save** then click **Close** to return to the Navigation window.

- A new stack called ActionPaks will appear in your Navigation window. The section underneath will contain the name of your ActionPak.

- Click on the new section for the ActionPak and the ActionPak window will appear. Enter the requested amount in the By annual amount box in Step 1. Enter the description of the initiative in the step 2 box. This is required. The description must contain details of the request sufficient to assess the need for the funding requested and the linkage to the noted strategic initiative(s). Link your ActionPak to a Strategic Priority or other category by clicking Select in the Category box and checking the applicable box(es) in the pop up.

The screenshot displays the ActionPak interface with the following components:

- Navigation Bar:** Includes tabs for Navigation, ActionPaks, What if...?, View/edit drivers, Across the board (all line items), Monthly spreading (all line items), Notes, and Files.
- Currently viewing:** Shows 'The College of NJ' with unit '10_01_1125: Scien' and version '2017 Final Budget'. The budget status is 'Started'.
- Headcount/FTE:** Displays data for 6/30/2016 and 6/30/2017, including additions and reductions.
- Version comparison:** Compares 2015 Actual, 2016 Revised Budget, 2017 Baseline Reference, and 2017 Final Budget.
- Summary:** Shows 'This section: Example 1' and 'This unit: Science Contingency' with financial totals and differences.
- Example 1:** The main content area with two steps:
 - Step 1:** 'Strategic Contingency' with an amount of 59100. It offers budget methods: 'By annual amount' (highlighted with a red box), 'By percent increase', 'By per head', 'By line item detail', 'By driver x rate', and 'By rows and columns'. The 'By annual amount' input field is also highlighted with a red box.
 - Step 2 (optional):** A text box for notes with an 'Edit' button and an 'Import notes from prior budgets' button.
- Category Selection:** A dropdown menu with a 'Select' button (highlighted with a red box) to choose categories.
- Line item usage:** A table showing that 1 other section also uses this line item, with a total of \$6,745 from other areas and \$0 from here, resulting in a total of \$6,745 for this line item.
- Category Selection Pop-up:** A dialog box titled 'Category Selection' for 'Strategic Contingency' with the following options:
 - Priority I : Attract and retain talented students, faculty, and staff into a diverse, inclusive, and healthy campus.
 - Priority II : Enhance Signature Experiences.
 - Priority III : Promote the college's distinctive identity to enhance institutional and program recognition at the national level.
 - Priority IV : Build, operate, and maintain a safe, sustainable, and accessible physical and technological infrastructure that supports high-caliber learning.
 - Priority V : Achieve a sustainable financial model that allows the college to realize its vision while maintaining quality and affordability for the students it serves.
 - Facilities : Non-strategic facilities request
 - IT : Non-strategic information technology request

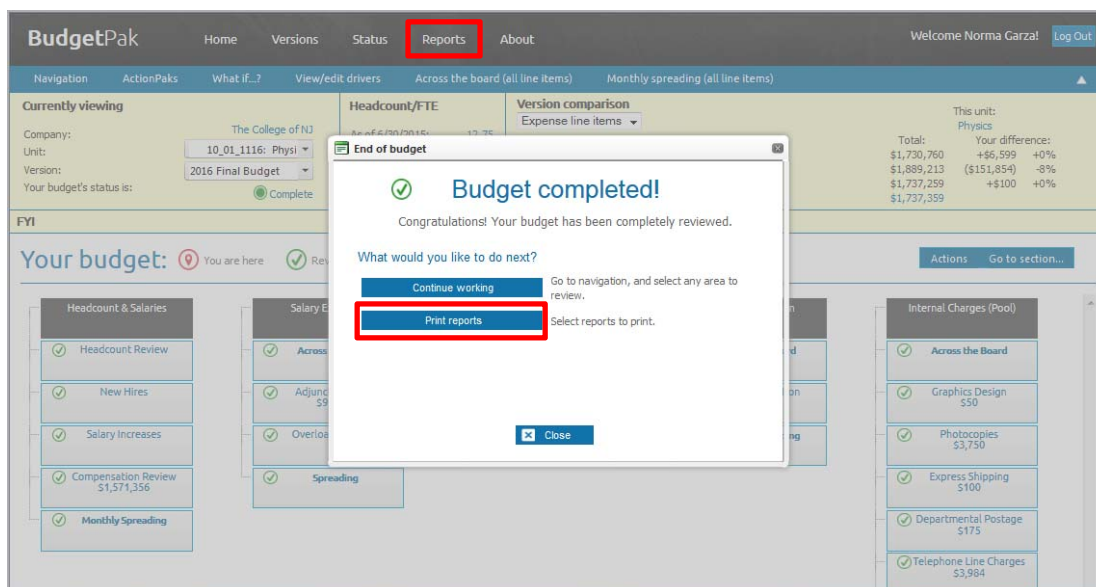
- a. The line item usage box will show you the amount already budgeted for that line item in your general budget. When you click save the ActionPak amount will be added.
 - b. The version comparison box will show you the impact of the ActionPak. The total of your ActionPaks should be the only variance for the unit from 2017 Baseline Reference to 2017 Final.
8. Continue to add additional ActionPaks as needed.

NOTE: Any line item which you used in an ActionPak will now appear in a Line Item Usage box within the general budget. When you click on a section in your Navigation window that relates to an ActionPak(s), you will see the general budget value, the ActionPak value and the total value for that line item.

- All P&L reports will display the total value for each line item.
- Run an ActionPak report to see the individual ActionPaks with their associated line items, amounts and notes.
 - In Advanced Reporting, Step 1, choose ActionPaks by Account or ActionPaks by Units: box.
- Run the My Budget Decisions report to see the ActionPaks listed along with the final budget.

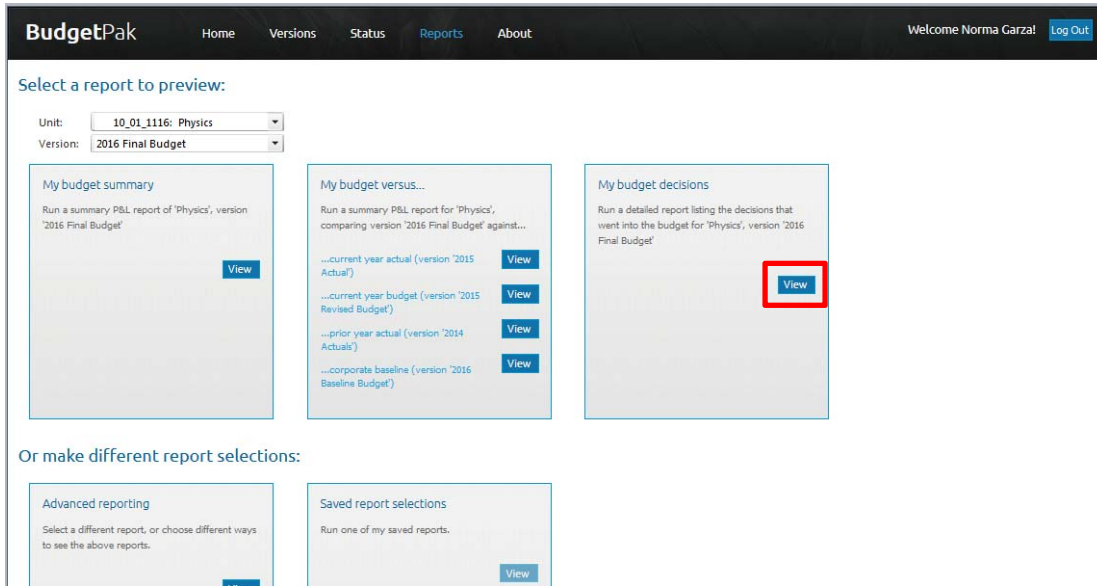
Viewing FY2017 Budget Reports

1. You can access the reporting menu either from the Budget Completed box by clicking **Print reports** or by clicking **Reports** in the top bar of the screen.



The screenshot shows the BudgetPak web application interface. At the top, there is a navigation bar with 'Home', 'Versions', 'Status', 'Reports', and 'About'. The 'Reports' tab is highlighted with a red box. Below the navigation bar, there are several tabs: 'Navigation', 'ActionPaks', 'What if...?', 'View/edit drivers', 'Across the board (all line items)', and 'Monthly spreading (all line items)'. The main content area displays 'Currently viewing' information for 'The College of NJ' and 'Headcount/FTE'. A 'Version comparison' table is visible on the right, showing 'Total' and 'Your difference' for various metrics. A 'Budget completed!' dialog box is overlaid in the center, with a green checkmark and the text 'Congratulations! Your budget has been completely reviewed.' Below this, it asks 'What would you like to do next?' and provides two options: 'Continue working' and 'Print reports'. The 'Print reports' option is highlighted with a red box. A 'Close' button is at the bottom of the dialog box. The background shows a 'Your budget:' section with various budget items like 'Headcount & Salaries', 'Salary E...', and 'Internal Charges (Pool)'.

2. Click **View** in the My Budget Decisions box.



BudgetPak Home Versions Status Reports About Welcome Norma Garza! [Log Out](#)

Select a report to preview:

Unit: 10_01_1116: Physics
Version: 2016 Final Budget

My budget summary

Run a summary P&L report of 'Physics', version '2016 Final Budget'

[View](#)

My budget versus...

Run a summary P&L report for 'Physics', comparing version '2016 Final Budget' against...

- ...current year actual (version '2015 Actual') [View](#)
- ...current year budget (version '2015 Revised Budget') [View](#)
- ...prior year actual (version '2014 Actuals') [View](#)
- ...corporate baseline (version '2016 Baseline Budget') [View](#)

My budget decisions

Run a detailed report listing the decisions that went into the budget for 'Physics', version '2016 Final Budget'

[View](#)

Or make different report selections:

Advanced reporting

Select a different report, or choose different ways to see the above reports.

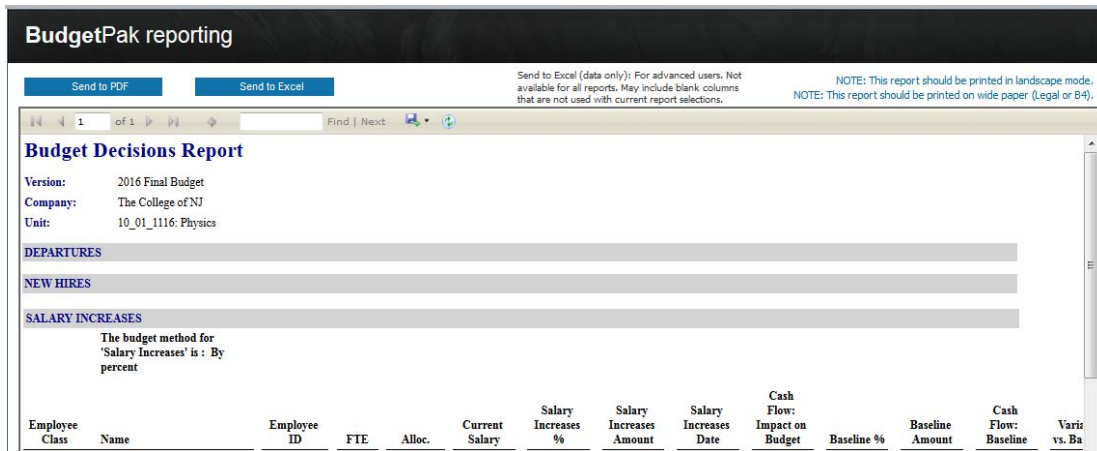
[View](#)

Saved report selections

Run one of my saved reports.

[View](#)

3. Review the report. It can be exported as a PDF or excel file by clicking the button at the top.



BudgetPak reporting

[Send to PDF](#) [Send to Excel](#)

Send to Excel (data only): For advanced users. Not available for all reports. May include blank columns that are not used with current report selections.

NOTE: This report should be printed in landscape mode. NOTE: This report should be printed on wide paper (Legal or 8.5).

1 of 1 Find | Next

Budget Decisions Report

Version: 2016 Final Budget
Company: The College of NJ
Unit: 10_01_1116: Physics

DEPARTURES

NEW HIRES

SALARY INCREASES

The budget method for 'Salary Increases' is : By percent

Employee Class	Name	Employee ID	FTE	Alloc.	Current Salary	Salary Increases %	Salary Increases Amount	Salary Increases Date	Cash Flow: Impact on Budget	Baseline %	Baseline Amount	Cash Flow: Baseline	Vari: vs. Ba
----------------	------	-------------	-----	--------	----------------	--------------------	-------------------------	-----------------------	-----------------------------	------------	-----------------	---------------------	--------------

LINE ITEMS											
Note: Baseline % increase for discretionary line items is -											
Section	Line Item	Baseline:		Increase / (Decrease) vs. 2015 Original Budget		2016 Baseline Budget		Your Increase / (Decrease) vs. 2016 Baseline Budget		FYT	Account notes
		2015 Original Budget	Your 2016 Final Budget	Amount	%	Amount	%	Amount	%		
Compensation	Officers And Employees	\$109,719	\$114,076	\$4,357	4.0 %	\$114,076	-	4.0 %			
Compensation	Faculty	\$1,147,649	\$1,007,120	(\$140,529)	-12.2 %	\$1,007,120	-	-12.2 %			
Compensation	Fringe Benefits	\$465,942	\$450,160	(\$15,782)	-3.4 %	\$450,160	-	-3.4 %			
Total nondiscretionary line items		\$1,723,310	\$1,571,356	(\$151,954)	-8.8 %	\$1,571,356	-	-8.8 %			
Adjunct Payment	Adjunct Payment	\$95,118	\$95,118	-	-	\$95,118	-	-			
Overload Payment	Overload Payment	\$0	\$0	-	-	-	-	-			
Student Aid Payroll	Student Aid Payroll	\$14,400	\$14,400	-	-	\$14,400	-	-			
Graphics Design	Graphics Design	\$50	\$50	-	-	\$50	-	-			
Photocopies	Photocopies	\$3,750	\$3,750	-	-	\$3,750	-	-			
Express Shipping	Express Shipping	\$100	\$100	-	-	\$100	-	-			
Departmental	Departmental Postage	\$175	\$175	-	-	\$175	-	-			
Telephone Line	Telephone Line Charges	\$3,984	\$3,984	-	-	\$3,984	-	-			
Telephone Toll	Telephone Toll Charges	\$150	\$150	-	-	\$150	-	-			
Media Center	Media Center Charges	\$200	\$200	-	-	\$200	-	-			
General Supplies	General Supplies	\$35,326	\$35,326	-	-	\$35,326	-	-			
Procurement Card	Procurement Card Charges	\$0	\$0	-	-	-	-	-			
Office Supplies-	Office Supplies-Office Max	\$3,500	\$3,500	-	-	\$3,500	-	-			
Equipment Rental	Equipment Rental	\$650	\$750	\$100	15.4 %	\$650	\$100	15.4 %			Differs from baseline
Equipment Repairs	Equipment Repairs	\$8,500	\$8,500	-	-	\$8,500	-	-			
Official Reception	Official Reception	\$0	\$0	-	-	-	-	-			
Total discretionary line items		\$165,903	\$166,003	\$100	0.1 %	\$165,903	\$100	0.1 %			
TOTAL EXPENSE		\$1,889,213	\$1,737,359	(\$151,854)	-8.0 %	\$1,737,259	\$100	-8.0 %			

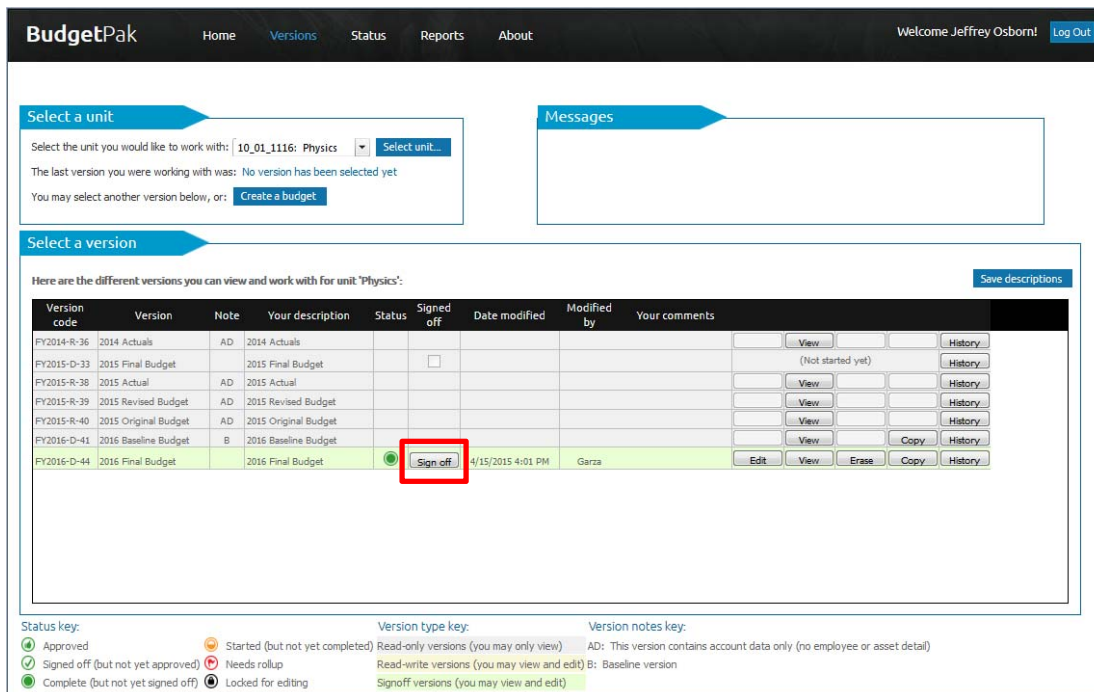
Page 1 of 1

4. You can print a report of your current annual budget compared to last year's budget or actuals. On the toolbar at the top of the window, click **Reports**. The Reports screen displays.
5. For a comparison against last year's budget, in the second box, *My budget versus...*, click the **View** button.
 - Your report will open in a new window.
 - Use your browser to print your report, or alternatively choose to send your report to Excel or PDF.

Completing and Signing-off on your Budget

In order to complete your FY2017 budget, each stack/account must be reviewed. Green check marks will already appear some sections since your budget has been prepopulated.

1. On the toolbar at the top of the window, click **Versions**. The Version Selection window displays.
2. In the **Select a Unit** panel, select the department you want to submit for approval.
3. You will see a sign-off button in the green highlighted row.



BudgetPak Home Versions Status Reports About Welcome Jeffrey Osborn! Log Out

Select a unit

Select the unit you would like to work with: 10_01_1116: Physics

The last version you were working with was: No version has been selected yet

You may select another version below, or:

Select a version

Here are the different versions you can view and work with for unit 'Physics':

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments
FY2014-R-36	2014 Actuals	AD	2014 Actuals					<input type="button" value="View"/> <input type="button" value="History"/>
FY2015-D-33	2015 Final Budget		2015 Final Budget		<input type="checkbox"/>			(Not started yet) <input type="button" value="History"/>
FY2015-R-38	2015 Actual	AD	2015 Actual					<input type="button" value="View"/> <input type="button" value="History"/>
FY2015-R-39	2015 Revised Budget	AD	2015 Revised Budget					<input type="button" value="View"/> <input type="button" value="History"/>
FY2015-R-40	2015 Original Budget	AD	2015 Original Budget					<input type="button" value="View"/> <input type="button" value="History"/>
FY2016-D-41	2016 Baseline Budget	B	2016 Baseline Budget					<input type="button" value="View"/> <input type="button" value="Copy"/> <input type="button" value="History"/>
FY2016-D-4	2016 Final Budget		2016 Final Budget		<input checked="" type="checkbox"/>	4/15/2015 4:01 PM	Garza	<input type="button" value="Edit"/> <input type="button" value="View"/> <input type="button" value="Erase"/> <input type="button" value="Copy"/> <input type="button" value="History"/>

Status key:
 Approved
 Signed off (but not yet approved)
 Complete (but not yet signed off)

Version type key:
 Started (but not yet completed)
 Read-only versions (you may only view)
 Read-write versions (you may view and edit)
 Signoff versions (you may view and edit)

Version notes key:
 AD: This version contains account data only (no employee or asset detail)
 B: Baseline version

- a. Click the **Sign-off** button;
- b. Click **Yes** to confirm you want to sign-off on the budget. The budget is now signed-off and ready to be approved by Approval Managers. Once a budget is signed-off, you can no longer make any changes to it, unless your Approval Manager re-opens that budget for you.

Select a unit

Select the unit you would like to work with: 10_01_1116: Physics

The last version you were working with was: No version has been selected yet

You may select another version below, or:

Select a version

Here are the different versions you can view and work with for unit:

Version code	Version	Note	Your description
FY2014-R-36	2014 Actuals	AD	2014 Actuals
FY2015-D-33	2015 Final Budget		2015 Final Budget
FY2015-R-38	2015 Actual	AD	2015 Actual
FY2015-R-39	2015 Revised Budget	AD	2015 Revised Budget
FY2015-R-40	2015 Original Budget	AD	2015 Original Budget
FY2016-D-41	2016 Baseline Budget	B	2016 Baseline Budget
FY2016-D-44	2016 Final Budget		2016 Final Budget

Sign off

Are you sure you would like to sign off on this budget?

Note: Once your budget has been signed off, you may not make any more changes to it (unless your manager revokes your signoff).

Status key:
 Approved
 Signed off (but not yet approved)
 Complete (but not yet signed off)

Version type key:
 Started (but not yet completed)
 Read-only versions (you may only view)
 Read-write versions (you may view and edit)
 Signoff versions (you may view and edit)

Version notes key:
 AD: This version contains account data only (no employee or asset detail)
 B: Baseline version

4. Your budget is now complete and you may log out of BudgetPak.

Select a unit

Select the unit you would like to work with: 10_01_1116: Physics

The last version you were working with was: No version has been selected yet

You may select another version below, or:

Select a version

Here are the different versions you can view and work with for unit "Physics":

Version code	Version	Note	Your description	Status	Signed off	Date modified	Modified by	Your comments
FY2014-R-36	2014 Actuals	AD	2014 Actuals		<input type="checkbox"/>			
FY2015-D-33	2015 Final Budget		2015 Final Budget		<input type="checkbox"/>			
FY2015-R-38	2015 Actual	AD	2015 Actual		<input type="checkbox"/>			
FY2015-R-39	2015 Revised Budget	AD	2015 Revised Budget		<input type="checkbox"/>			
FY2015-R-40	2015 Original Budget	AD	2015 Original Budget		<input type="checkbox"/>			
FY2016-D-41	2016 Baseline Budget	B	2016 Baseline Budget		<input type="checkbox"/>			
FY2016-D-44	2016 Final Budget		2016 Final Budget	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4/15/2015 4:01 PM	Garza	

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 Read-write versions (you may view and edit)
 Signoff versions (you may view and edit)

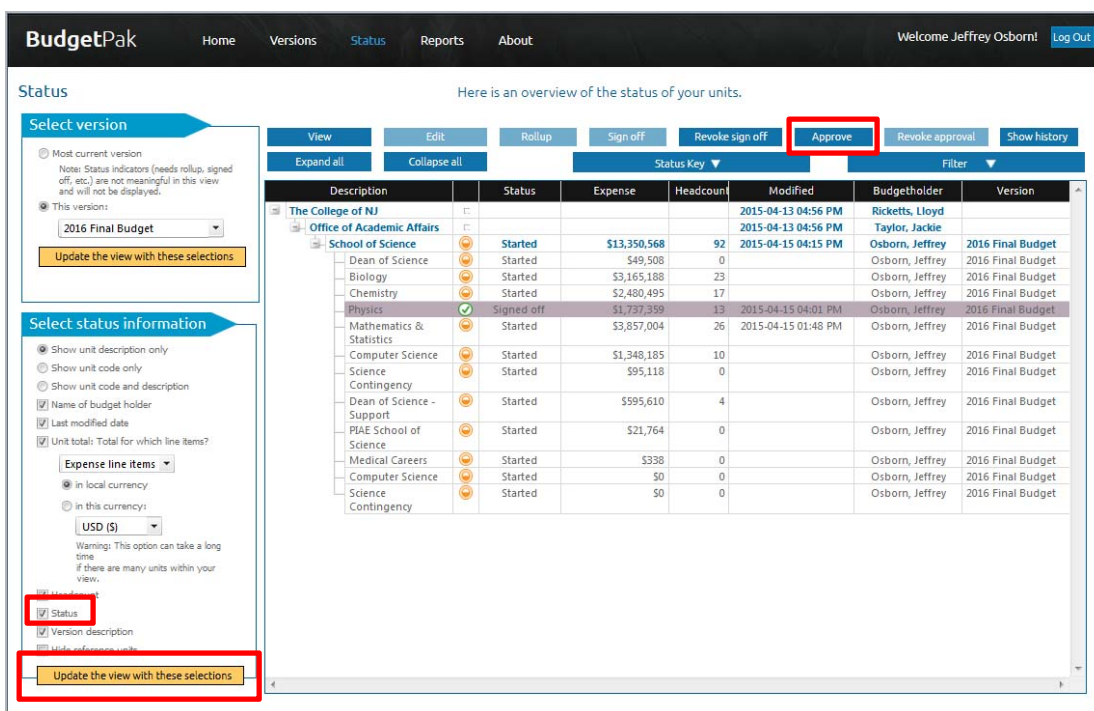
Version notes key:
 AD: This version contains account data only (no employee or asset detail)
 B: Baseline version

NOTE: For each department for which you are responsible for submitting a budget, all of the steps in all of the sections above must be completed.

Approving Budgets

Approval Managers have the responsibility of approving the budget for each of their units, as well as the roll-up unit to which they are assigned.

1. On the toolbar at the top of the window, click **Status**. The unit Status window displays, showing the budget status for all departments for which you are responsible.
2. In the upper left Select Version panel of the Status window, verify that you are viewing the FY2017 Final Budget.
 - In the Select Status Information panel, make sure that status box is checked.
 - Click update view with these selections.



The screenshot shows the BudgetPak interface with the 'Status' window open. The window title is 'Status' and it contains a toolbar with buttons: View, Edit, Rollup, Signoff, Revoke sign off, **Approve** (highlighted in red), Revoke approval, and Show history. Below the toolbar is a table with columns: Description, Status, Expense, Headcount, Modified, Budgetholder, and Version. The table lists various units under 'The College of NJ' and 'Office of Academic Affairs', including 'School of Science' and 'Dean of Science'. One row, 'Physics', is highlighted in blue and has a green checkmark icon in the Status column. On the left side, there are two panels: 'Select version' and 'Select status information'. In the 'Select status information' panel, the 'Status' checkbox is checked and highlighted in red. Below this panel is an 'Update the view with these selections' button, also highlighted in red.

Description	Status	Expense	Headcount	Modified	Budgetholder	Version
The College of NJ				2015-04-13 04:56 PM	Ricketts, Lloyd	
Office of Academic Affairs				2015-04-13 04:56 PM	Taylor, Jackie	
School of Science	Started	\$13,350,568	92	2015-04-15 04:15 PM	Osborn, Jeffrey	2016 Final Budget
Dean of Science	Started	\$49,508	0		Osborn, Jeffrey	2016 Final Budget
Biology	Started	\$3,165,188	23		Osborn, Jeffrey	2016 Final Budget
Chemistry	Started	\$2,480,495	17		Osborn, Jeffrey	2016 Final Budget
Physics	Signed off	\$1,737,359	13	2015-04-15 04:01 PM	Osborn, Jeffrey	2016 Final Budget
Mathematics & Statistics	Started	\$3,857,004	26	2015-04-15 01:48 PM	Osborn, Jeffrey	2016 Final Budget
Computer Science	Started	\$1,348,185	10		Osborn, Jeffrey	2016 Final Budget
Science	Started	\$95,118	0		Osborn, Jeffrey	2016 Final Budget
Contingency						
Dean of Science - Support	Started	\$595,610	4		Osborn, Jeffrey	2016 Final Budget
PIAE School of Science	Started	\$21,764	0		Osborn, Jeffrey	2016 Final Budget
Medical Careers	Started	\$338	0		Osborn, Jeffrey	2016 Final Budget
Computer Science	Started	\$0	0		Osborn, Jeffrey	2016 Final Budget
Science	Started	\$0	0		Osborn, Jeffrey	2016 Final Budget
Contingency						

3. Click on the row containing the first unit that contains the “signed-off” icon, which is a green checkmark inside a green circle. (When you select the unit, the row will be highlighted in blue.)
4. Click the **Approve** button (located above list of units). Note that the icon changes to a green thumbs-up and the status changes to ‘Approved.’ This indicates that the budget for that unit is now approved by you.

BudgetPak Home Versions **Status** Reports About Welcome Jeffrey Osborn! [Log Out](#)

Status Here is an overview of the status of your units.

Select version

Most current version
Note: Status indicators (needs rollup, signed off, etc.) are not meaningful in this view and will not be displayed.

This version:

2016 Final Budget

[Update the view with these selections](#)

Select status information

Show unit description only

Show unit code only

Show unit code and description

Name of budget holder

Last modified date

Unit total: Total for which line items?

Expense line items

in local currency

in this currency:

USD (\$)

Warning: This option can take a long time if there are many units within your view.

Headcount

Status

Version description

Hide reference units

[Update the view with these selections](#)

View Edit Rollup Sign off Revoke sign off Approve Revoke approval Show history

Expand all Collapse all Status Key Filter

Description	Status	Expense	Headcount	Modified	Budgetholder	Version
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Contingency	Started					
Dean of Science - Support	Started	\$595,610	4		Osborn, Jeffrey	2016 Final Budget
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Science	Started	\$0	0		Osborn, Jeffrey	2016 Final Budget
Contingency	Started					

5. Repeat Steps 3 and 4 until all of the units for which you are responsible have been approved.
6. At the roll-up unit level, which contains your name as the budgetholder, click the **Rollup** button to consolidate all the budgets in that unit, then click the **Sign-off** button.
7. Once you have signed-off, your budgets can be reviewed and rolled up by the next level of Approval Managers.