



NAVIGATING FORMS

1. Accessing Forms
2. Changing Point of View (POV)
3. Data Entry & Data Entry Features
4. Adjust, Spread, Supporting Detail, Comments
5. Tips and Tricks

FORM COMPONENTS

The screenshot displays the Planning and Budgeting Cloud interface. At the top, the 'Navigation Toolbar' contains icons for Employee Planning, Budget Overview, Multi-Year Budgeting, Strategic Request Input, Forecasting, Supplemental Budget Req, and Reports. Below this, the 'Instructions' callout points to an information icon on the 'Budget Input' card. The 'Point of View' callout points to a dropdown menu showing dimensions: LEntity (The College of New Jersey), Fund (100000 - General Fund), Organization (0000 - Default Organization), Program (0000 - Default Program), and Category (000 - Default Category). The main data table below has columns for Loaded Data, Total Plan Element, and Inputed Data, with rows for FY19, FY20, FY21, and YearTotal. A 'Total Before Suppl Req' column is also present.

	Loaded Data	Total Plan Element	Loaded Data	Total Plan Element	Inputed Data	Total Before Suppl Req	Total Plan Element	Total Plan Element	
	FY19	FY20	FY20	FY20	FY21	FY21	FY21	FY21	
	Total Actuals & Encumbrances	Budget	Total Actuals & Encumbrances	Remaining Budget \$	Budget	Budget	PY Actual vs NY Budget (\$)	PY Actual vs NY Budget (%)	
	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	YearTotal	
608130 - Marketing Initiatives									
608140 - Advertising for Recruitment									
608150 - Advertisement of Bids									
Advertising & Recruitment									
610000 - Rental Expense Buildings & Grounds									

Forms in Planning and Budgeting have the following structure:

- **Navigation Toolbar** allows you to navigate to the other cards in that cluster.
- **Instructions** display additional information and instructions on the form. Note: Instructions are set by the System Administrator and not all forms will include instructions.
- **Point of View (POV)** defines the section of data in the Planning and Budgeting database you are viewing. You select the desired members for each dimension to determine the context for the pages, rows, and columns.

FORM CHANGING POV OPTION 1

Budget Input ⓘ

LEntity The College of New Jersey	Fund 100000 - General Fund	Organization 0000 - Default Organization	Program 0000 - Default Program	Category 000 - Default Category	
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Loaded Data Total Plan Element Loaded Data Total Plan Element Inputted Data **Total Before Suppl** Total Plan E

Select a Member ⓘ OK Cancel

Category
"000 - Default Category"

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 III

Members Category > All Categories > Instruction

To change one specific member within your **POV**:

1. Click directly on the member you want to edit (In this example: 000 – Default Category)
2. Use the **Member Selector** to select the desired member from the hierarchy

FORM POV MEMBER SELECTOR

The screenshot shows the 'Select a Member' interface. At the top left, the text 'Select a Member' is displayed. To its right are 'OK' and 'Cancel' buttons. A callout box labeled 'Confirm Selection' points to the 'OK' button. Below the header is a search bar labeled 'Search Organization' with a callout 'Search Bar' pointing to it. The main area is a tree view of organizations. The 'Office of Academic Affairs' is expanded, showing a list of schools. The 'School of Nursing, Health & E...' is selected, and within it, '1701 - Nursing' is checked with a blue checkmark. A callout box labeled 'Selected member is checked' points to this checkmark. A callout box labeled 'Drill Through Hierarchy' points to the 'Office of Academic Affairs' header. A settings menu is open, showing options: 'Add Filter', 'Show Alias' (checked), 'Show Member Counts', 'Sort Alphabetically', 'Refresh', 'Clear Selection', and 'Show Invalid Members'. A callout box labeled 'NOTE: Use settings button to select Show Alias' points to the settings menu.

Within the **Member Selector** a member can be selected in two ways:

1. Type the **Member Name or Alias** in the Search Bar
2. Drill through the hierarchy and check the member desired
 - a) Select the triangle at the right of a member expands the hierarchy across the screen
 - b) Select a member by clicking just to the left of the member and a blue check mark will appear

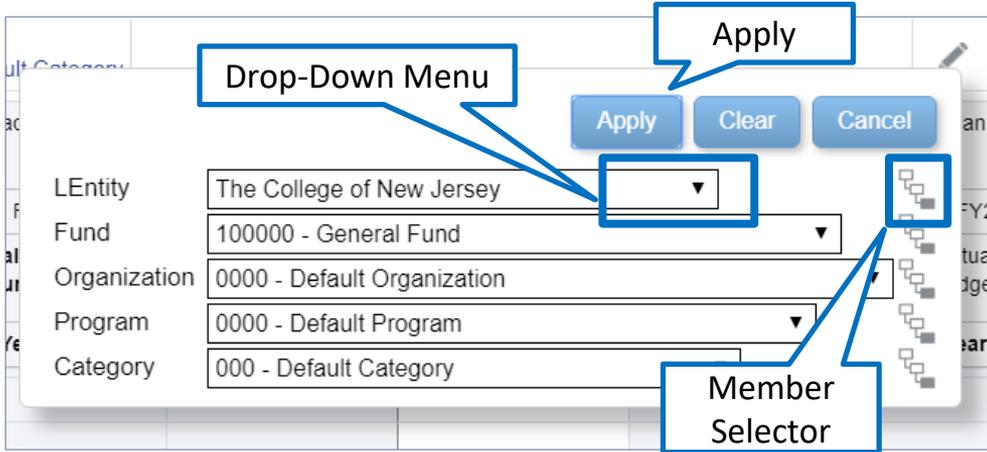
In either case confirm the selection at the top left of the screen

Drill Through
Hierarchy

FORM CHANGING POV OPTION 2

Budget Input ⓘ

LEntity The College of New Jersey	Fund 100000 - General Fund	Organization 0000 - Default Organization	Program 0000 - Default Program	Category 000 - Default Category		
	Loaded Data	Total Plan Element	Loaded Data	Total Plan Element	Inputted Data	
					Total Before Suppl Rep	Total Plan E



Drop-Down Menu

Apply

Apply Clear Cancel

LEntity
The College of New Jersey

Fund
100000 - General Fund

Organization
0000 - Default Organization

Program
0000 - Default Program

Category
000 - Default Category

Member Selector

Apply

To change one or more members within your **POV**:

1. Click on the **Pencil Icon** 
2. Use the **Drop-Down Menus** or the **Member Selectors** to select the desired member from the hierarchy
3. Click **Apply**