UNIVERSITY
BUDGET OFFICE

Kuali Financial System

KFSX90 BUDGET TAB

Training Guide

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OVERVIEW

The primary purpose of the KFSX90 Budget Tab is to replace position level revised budget information previously viewed in BPM Live.

The implementation of the KFSX90 Budget Tab allows the position level detail to be viewed at higher organization levels (Department, Division etc.).

Data is retrieved from a few of the following sources:

- Original Budget: BPM Working Budget Data
- Current Budget & FTE: BPM WB Data plus KFS Position and Operating Budget Amendments
- PHR Salary & FTE: PHR data is updated bi-weekly

ACCESS TO KFSX90 BUDGET TAB

All KFS Web users will have access to the Budget Tab based on current KFS Web security access.

- *If you have any questions regarding KFS Access, please contact KFS Support at kfs.umd.edu or call the KFS Help Desk extension at 5-2603.*

The KFSX90 Budget Tab can be accessed and viewed from the *KFSX90 Overview* Reports.

- *If you have questions about how to navigate and utilize the KFS Budget Tab, please contact your assigned Budget Analyst for your Division.*
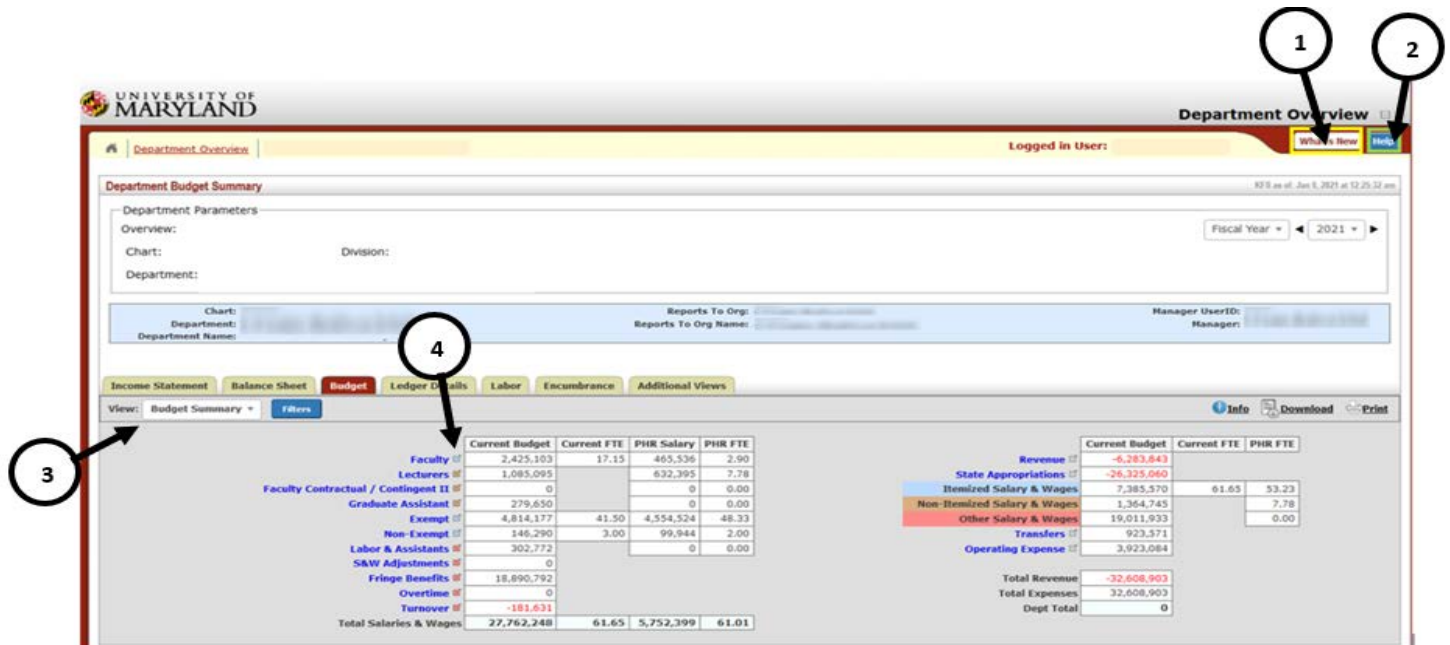
DASHBOARD FEATURES

Figure 1

Once the Budget Tab is selected, the default view will be the Budget Summary. Below you will find a few new features that will help you navigate through the tab.

1. **What's New** (figure 1) - This feature provides the latest information on changes to the KFS090 application.
2. **Help** (figure 1) – This dialog box shows the help items that are available and can be used on each view. (Department Overview shown in example above)
   - The "**Department Navigation Help**" button will take you through the navigational controls of the KFS090. (see figure 2)
   - The "**Department Budget Summary Help**" button will explain the various parts of the View portion of the KFS090 page. (see figure 2)
   - The "**Software Release Notes**" button will display a page listing the notes of the latest KFS090 software release (see figure 2).

3. **View** (figure 1) - the dropdown will allow users to select different view options.

4. ▨ (figure 1) this icon will appear on various views in the Budget tab. Once selected it will open a separate window and allow user to drill down on the data detail.
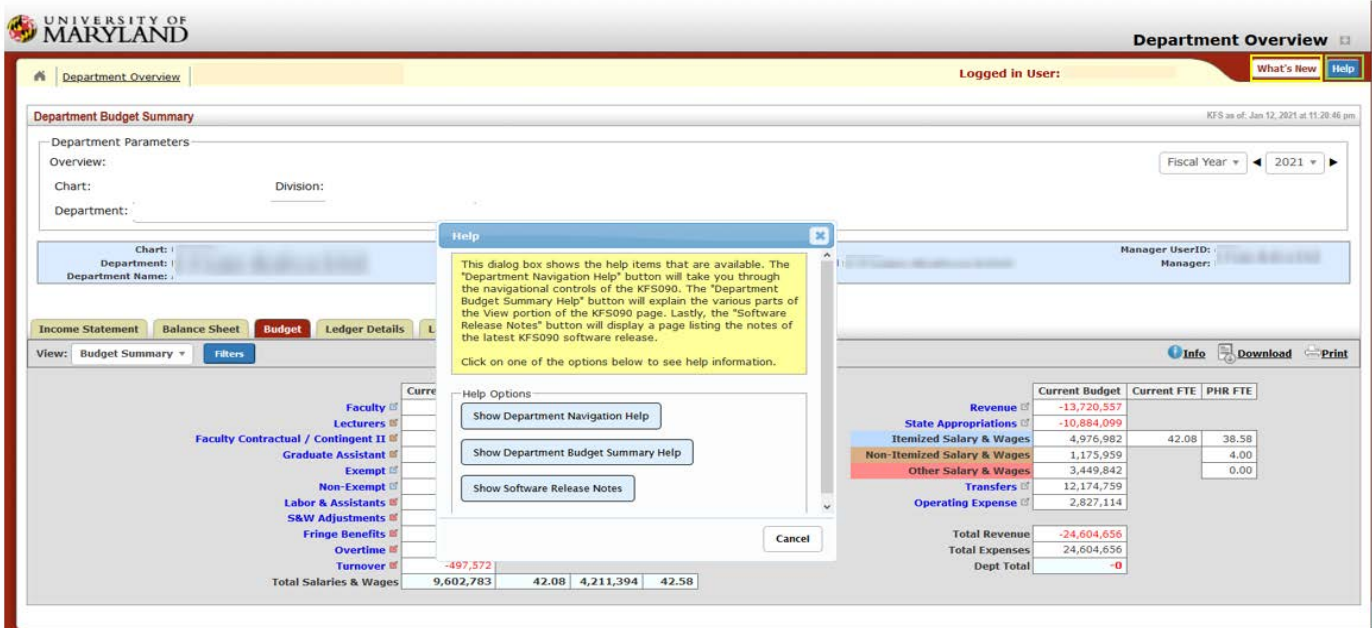
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Figure 2

KFS BUDGET TAB VIEWS

This report tab provides nine or eleven views of the budget data depending on the organization level selected. This guide will highlight a few to display some of its features.

- **Budget Summary**
- **Budget Account List (Higher Org Level)**
- **Object Code Summary**
- **Position Budget**
- Rollup Summary
- Org Employees (Higher Org Level)
- Vacant Positions
- Budget Versus Actual Trend
- **5 Year Historical Trend**
- **Budget Amendment – Position**
- **Budget Amendment – Operating**

Budget Summary

The Budget Summary View displays the breakdown of Salary & Wages on the left-hand side and the summary on the right-hand side. The view provides original, current (revised), future budget amounts and FTEs along with the current PHR Salaries and FTEs for the selected fiscal year. The Budget Summary view format is the same as the Account Budget Summary screen in BPM. The filter offers multiple selections which allows the user to narrow down on the data.

Also similar to the BPM Account Summary are the color coordination of the following:

- *Itemized Salary/Wages* (Faculty, Exempt & Non-Exempt) are highlighted in **Light Blue**.
- *Non-Itemized Salary/Wages* (Lecturers, Faculty Contractual, Contingent II & GA's) are highlighted in **Brown**.
- *Other Salary & Wages* (Labor & Assistants, Salary & Wage Adjustments, Fringe Benefits, Overtime & Turnover) are highlighted in **Red**.

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Budget Account List

The Budget Account List view will display the selected fiscal year's original, current (revised) and future FTE and budget amounts for all accounts under the selected organization. In this view the prior year actuals are split between revenue and expense to provide users with a side-by-side view. The account numbers are hyperlinks which allow users to drill down to the Account Overview for the selected account. Users also have the option to apply a variety of filters to the data.

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Object Code Summary

The Object Code Summary view will display the original, current (revised) and future budget amounts and FTEs for the selected fiscal year. The filter option allows you to narrow down on category and subfund group.

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Position Budget

The Position Budget view will display the Position budgets and Employee Position budgets for the selected organization and fiscal year. The Position Budget view allows users to see position level detail at higher organization levels (Department, Division etc.). In addition, users have the option to apply filters as well as sort. The sort feature allows you to rearrange the options listed by moving to the top or bottom of your list depending on how you would like it sorted.

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5 Year Historical Trend

This view will display the previous five-year actuals and revised budget. There is a filter for revenue or expense with a check box to populate all the previous year revised budgets. The filter allows users to change the fiscal period by clicking the Filter button. The users also have the ability to list all of the Expense and/or Revenue object codes through the Accounting Category Filter option.

Object Code	FY2021-07 Revised Budget	FY2021-07 YTD Actuals	FY2020-07 YTD Actuals	FY2019-07 YTD Actuals	FY2018-07 YTD Actuals	FY2017-07 YTD Actuals
Salaries & Wages						
1000 - Accrued Leave Payout	0.00	0.00	0.00	77,546.19	0.00	61,672.43
1011 - Faculty Academic Year	1,343,972.00	11,656.30	0.00	1,000.00	1,000.00	1,500.00
1012 - Faculty 12 months	799,673.00	222,062.74	167,480.02	190,092.91	175,369.29	181,600.54
1013 - Exempt Staff	4,814,177.00	2,383,360.96	2,492,953.03	2,287,073.70	1,904,580.41	1,898,034.67
1014 - Non Exempt Staff	146,290.00	51,449.34	88,103.12	100,773.38	81,728.66	81,549.32
1015 - Faculty Non Tenured Academic Year	83,180.00	60,424.93	65,318.32	42,424.36	42,545.52	3,545.46
1016 - Faculty Non Tenured 12 Months	198,278.00	129,696.47	108,446.14	116,556.13	113,481.52	52,943.65
1018 - Faculty Non Tenured Lecturer	1,085,095.00	559,683.40	477,620.09	478,772.65	372,844.27	370,037.14
1020 - Graduate Assistants	279,650.00	533,334.72	582,986.11	548,275.00	351,356.10	101,043.59
1099 - Regular S&W Adjustments	0.00	12,625.00	8,000.00	0.00	0.00	0.00
2000 - Labor and Assistance	-679.00	0.00	0.00	0.00	0.00	0.00
2068 - Faculty Hourly	0.00	1,487.70	0.00	1,000.00	8,700.00	500.00
2069 - Faculty Contractual	0.00	0.00	0.00	0.00	0.00	0.00
2071 - Faculty Summer School/Other	0.00	114,059.64	85,515.62	40,993.85	18,954.43	33,207.72
2072 - Exempt Contingent 1	43,294.00	63,382.44	41,109.89	63,757.16	39,731.00	47,249.93
2073 - Non-Exempt Contingent 1	14,000.00	7,560.00	5,224.35	13,608.12	12,555.20	21,184.95
2075 - Student Wages	239,157.00	73,187.29	63,426.97	273,914.83	283,975.41	344,304.32
2078 - Non Resident Alien Fellows	0.00	2,000.00	0.00	0.00	10,833.29	11,439.00
2080 - Summer Salary Faculty	7,000.00	251,206.83	51,958.34	34,638.06	27,344.90	15,218.97
2081 - Summer Salary Graduate Assistant	0.00	102,088.85	52,127.11	42,766.08	0.00	3,984.77
2090 - Contingent 2	0.00	27,177.44	31,190.83	48,767.92	75,921.15	0.00
2099 - Contractual S&W Adjustments	0.00	196,294.18	198,281.36	0.00	0.00	0.00
2100 - Overtime	0.00	522.75	1,826.14	1,939.36	2,163.18	1,925.97
Salaries & Wages Totals	9,053,087.00	4,803,260.98	4,521,567.44	4,363,899.70	3,523,084.33	3,230,942.43

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Budget Amendments- Position

The Budget Amendment - Position view displays position budget amendments in single view for a selected fiscal year. The document numbers are hyperlinks which allow users to drill down and retrieve more information. This view also comes with a filter option to narrow down data.

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Budget Amendments- Operating

The Budget Amendment – Operating view displays operating amendments in a single view for non-itemized object codes for a selected fiscal year. The document numbers are hyperlinks which allow users to drill down and retrieve more information. This view also comes with a filter option to narrow down data.

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