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Accessing the System

Path: After logging into Spectrum go to Go >> Georgia State University
Path: When the screen refreshes go to Budget >> GSU Budget

Note: Update/Display will bring up only the current record for each position.
Update/Display All will bring back all records for each position.
Add is used to create a new position.
Correction is only available to Budget & Planning.
Searching for a Position

When this screen pops up you have the choice of typing in any one of the following fields: Budget Period, Department ID, Original Budget Position Number, Employee ID, or Employee last name.

Click Search.

Following are examples of the different ways to do a search:
Once you find the person or position you are looking for double click on the name/position or press OK when the name is highlighted in blue. That will bring up this screen. This screen will allow you to view the budget information for the selected record.

To look at multiple records in a search, you can use the Next in List/Previous in List command.

Execute a search.
Click on the name or position that you would like to view first.

To view the next position in the search that you generated, click the Next in List icon.
The next record will appear.

To view a previous record, click the Previous in List icon.
The previous record will appear.
Creating a Vacant Position

Path: Budget >> GSU Budget System >> GSU Budget >> Add

Enter the Budget Period, Department ID and the next available position number in the Original Budget Position Number field and then click OK.
A new screen will pop up with blank fields.
Enter the information about the vacant position, account information, and the requested amount in the required fields. The Eff Date field is for the effective date that the action will begin. The Status field has three options: Filled, Terminated, and Vacant. To setup a vacant position choose vacant.
The Bus Unit field is a list that is categorized by college and/or administrative unit. To view the list you can hit the drop down menu arrow.

Select the appropriate business unit and click OK.
To see a list of valid titles for the Title field, you can click the drop down menu arrow. This will bring up a new panel. You can search for titles by entering part or all of the title.

Note: The search feature is case sensitive. Abbreviations are used often.

Following are examples of the different ways to do a search:

<table>
<thead>
<tr>
<th>SetID</th>
<th>Title</th>
<th>Desc</th>
</tr>
</thead>
<tbody>
<tr>
<td>GSUFS</td>
<td>Assistant Professional</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Academic Professional</td>
<td>Academic Services</td>
</tr>
<tr>
<td>GSUFS</td>
<td>Accounting Professional</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Aeronautics Professional</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Agriculture/Forestry Professional</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Allied Health Professional</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Alumni Relations Professional</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Assistant Professor</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Assoc Professor, Adjunct</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Assoc Professor, Clinical</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Assoc Professor, Part-time</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Assoc Professor, Research</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Assoc Professor, Visiting</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Professor</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Professor - Part time</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Professor, Adjunct</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Professor, Clinical</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Professor, Regents</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Professor, Research</td>
<td></td>
</tr>
<tr>
<td>GSUFS</td>
<td>Professor, Visiting</td>
<td></td>
</tr>
</tbody>
</table>
Click on a desired title code and click OK.
Type in the fund, department, program, subclass, project (FC 20 projects), and account code. You can also use the Speedtype field by clicking on the box and typing in the speedtype so that the chartfield information will automatically populate the fields.
To see a list of valid accounts for the Account field, you can click the drop down menu arrow or you can type in a number and click Shift-F4.

Select the appropriate account and click OK.
Enter the appropriate salary and FTE information in the Salary 1/FTE1 and salary 2/FTE2 fields. The Salary 1/FTE1 field corresponds to the July 1 salary. The Salary 2/FTE2 field corresponds to the January 1 salary.
To setup the budget for the new position, enter the amount to be budgeted for the fiscal year in the Requested field and the budget FTE in the Req FTE field. Then type a comment denoting the action in the Comment field.
Click the Save icon.
The Save icon will turn gray once the changes are saved.
Setting Up a New Hire and/or Filling a Vacant Position

Path: Budget >> GSU Budget System >> GSU Budget >> Update/Display
When this screen pops up enter the Budget Period and either the Department ID and/or Original Budget Position Nbr. to search for the existing position you would like to fill.
A screen will pop up for the existing position. Make sure the Eff Date field is highlighted and click Insert Row.
The system will default the current date into the Eff Date field. The user needs to change the effective date to the effective date that the action will begin.

For this example, assume the employee’s hire date is January 1, 2006.

For this panel, in addition to entering the effective date the other fields need to be entered.

- Switch the status from Vacant to Filled.
- Enter employee ID and employee’s name. If there is no employee ID assigned at the time of entry, use 999999.
- Verify that the business unit, title code, chartfield information, and account number are correct. There should ALWAYS be a speedtype in the speedtype field.
Calculate the funds required for the position for the remainder of the fiscal year.

- In this example, the employee’s salary is $32,000 with an FTE of 1.00. The employee’s begin/hire date is January 1, 2006. For half the year this employee will earn $16,000. This person’s FTE for half the year will be .50.

To setup the budget for the new position, enter the amount in the Requested field that needs to be added to or taken away from the Occurrence amount to equal what should be budgeted for the fiscal year for that position.

The Requested field affects the Cumulative and Occurrence amounts. The only time we use the Earnings field is when an employee leaves the position.

Also enter the FTE amount in the Req FTE field that needs to be added or taken away from the Occur. FTE to equal what should be budgeted for the fiscal year for the position.

Then type a comment denoting the action in the Comment field.
If you notice there are three tabs listed that represent three panels: GSU Budget, Proposed, and HR Data. You will work primarily in the GSU Budget panel, but when you are adding or terminating a person and/or position, you will need to use the HR Data panel. The Proposed panel is for use primarily during the construction of the Original Budget but during maintenance of the budget system throughout the year you may need to go to this panel to delete any Original Budget information for new changes to the position. This will help avoid problems when building the next Original Budget.

Go to the Proposed panel. If you are filling a position, delete everything from this panel except the effective date.
Go to the HR Data panel by clicking on the HR Data tab.
Enter the type of degree received (if applicable) in the Degree field.
The Contract field has four options: Academic, Prof/Staff, Temporary, and YearAcad.

The Academic option is for professors who have a .75 FTE.

The Prof/Staff option is for GSU staff members. The Temporary option is for temporary employees. This option will never be used since we budget temporary employees in lump sums. They do not get their own position number.

The YearAcad option is for faculty like deans and chairs who are academic but get paid twelve paychecks instead of ten. These positions are 1.00 FTE and are numbered 0 – 199.
For the purposes of our example we are filling a staff position so we will select the Prof/Staff option.

You must also fill in the HR Position # and the Empl Date. Do not fill in the SSN under any circumstances.

You can get the HR position number from either the PAF or from someone in HR. If the HR position number is unassigned, use 999999.

The Empl Date is the employment date of the employee and/or the first day of work in the new department.

You do not need to fill in the termination date. That field is only used when an employee is leaving GSU.
Return to the GSU Budget panel by clicking on the GSU Budget tab.
Click the Save icon.
In this example, notice that the outer scroll is in the up position. This signifies that there is more than one budget adjustment. Use the scroll to see the history behind this position.
Setting Up a Sponsored Line

Path: Budget >> GSU Budget System >> GSU Budget >> Update/Display All
When this screen pops up enter the Budget Period and the Department ID, Original Budget Position Nbr., Employee ID, and/or Employee Last Name to search for the existing position you would like to adjust.
Once you find the record you are looking for double click on the name or press OK when the name is highlighted in blue. That will bring up this screen.

While the cursor is in the Eff Date field, click Insert Row.
Enter a new effective date. Adjust the existing budget for the person who will have a sponsored charge off.

- In this example, the employee’s salary will be split between dept. 612200000 and project FLU27 for the fall semester. Fall semester the total amount the employee will earn is $50,000 with a .375 FTE. Since the employee is being split half general and half sponsored during this time period, he will earn $25,000 with a .188 FTE in dept. 612200000 and $25,000 with a .187 FTE from project FLU27.

Place the budget reduction amounts in the Requested fields. Be sure to fill out a comment.
Place the cursor in the Fund field and click Insert Row. Enter the chartfield information for the sponsored line by either using the Speedtype field or by typing in the Fund, Dept, Program, Class, and Project. Once you have completed this step please be sure there is a speedtype in the speedtype field. There should ALWAYS be a speedtype in the speedtype field.
Be sure to enter the account code in the Account field. Since this is a change that takes affect after July 1, leave the salary and FTE fields blank.

To setup the budget for the sponsored line, enter the budget amount in the Requested field and the budget FTE in the Req FTE field. Then type a comment denoting the action in the Comment field.

Note: In most cases, the adjustment amounts for general and sponsored will net to zero.
Next go to the Proposed panel. Delete everything from this screen except the Effective Date.
Click the Save icon.
Title Change/Salary Adjustment

Path: Budget >> GSU Budget System >> GSU Budget >> Update/Display
When the Update/Display screen pops up you have the choice of typing in any one of the following fields: Budget Period, Department ID, Original Budget Position Number, Employee ID, or Employee Last Name.

Click Search.

Once you find the record you are looking for double click on the position or press OK when the position is highlighted in blue.
A screen will pop up for the existing position.

Place the cursor in the Eff Date field. Click Insert Row. Change the effective date in the Eff Date field. For our example the effective date is 4/30/06 since the new position begins 5/1/06. The status field remains the same since we only use the Terminated status when we are terminating a budget position.
To reflect how much the person earned in that position, enter the amount earned in the old position in the Earnings and Earn FTE fields. The Earnings field affects only the Occurrence and Occur. FTE amounts. Then type a comment denoting the action in the Comment field.

Go to the Proposed tab to verify that all information except the effective date is deleted. If there is any information there, please delete it.

Click the Save icon.
Next, we must setup the new position. Place the cursor in the Eff Date field. Click Insert Row. Change the effective date in the Eff Date field. For our example the effective date is 5/1/06 since the new title begins on this date. The status field remains the same since we only use the “Terminated” status when we are ending a non-general budget or discontinuing a budget position. Be sure to setup the new salaries in the Salary fields.

Be sure to update the title code in the Title field.

To setup the budget for the new title, enter the budget amount in the Requested field and the budget FTE in the Req FTE field. Then type a comment denoting the action in the Comment Field.
Click on the Proposed tab. Delete everything except the effective date.
Click the Save icon.

Note: The Cumulative amount and FTE is the amount used by the position for the fiscal year. The Cumulative FTE should never be greater than one nor less than zero. In our example the Cumulative amount and FTE is for the period July 1, 2005 through June 30, 2006. The Cumulative amount and FTE includes the Occurrence amount and FTE. The Occurrence amount and FTE is the amount currently available in the position that can be transferred to another position if necessary. In our example the Occurrence amount and FTE is for the period May 1 through June 30, 2006.
Changing Earnings Distribution – Multiple Sources to One Source

Path: Budget >> GSU Budget System >> GSU Budget >> Update/Display
When the Update/Display screen pops up you have the choice of typing in any one of the following fields: Budget Period, Department ID, Original Budget Position Number, Employee ID, or Employee Last Name.

Click Search.

Once you find the record you are looking for double click on the name or press OK when the name is highlighted in blue.
A screen will pop up for the existing position.

For our example this is a picture of the person’s current budget. She has multiple earning sources so if you use the inner scroll you can view her earnings detail. The outer scroll is used to view position history.

The top record shows general fund distribution details.

The bottom record shows sponsored distribution details.
Place the cursor in the Eff Date field. Click Insert Row.
Change the effective date in the Eff Date field. For our example the employee is going to be 100% general effective 1/1/06.

Using the inner scroll first we will adjust the general line. For our example, to correct the budget for the general line we need to increase it by $25,250 with a .187 FTE. Enter the amount in the Requested field that needs to be added to or taken away from the Occurrence amount. The goal is for the Occurrence amount to equal what should be budgeted for that position for the entire fiscal year. Be sure to adjust the Req FTE accordingly. Then type a comment denoting the action in the Comment field.
Next, using the inner scroll we will adjust the sponsored line. For our example, to correct the budget for the sponsored line we need to show an earnings amount of $25,250 with a .188 FTE. Enter the amount in the Earnings and Earn FTE fields.

Since we are discontinuing a sponsored (fund code 20) budget we will also reduce the Occurrence to zero since funds are normally returned to the project. Use the requested fields to make the adjustment.

Then type a comment denoting the action in the Comment field.

Note: Be sure to go to the Proposed tab to verify that all Original Budget information has been deleted. The only thing that should be on this screen for the new row is the effective date.
Click the Save icon.

Using the inner scroll you can view how entering the Earnings and Earn FTE amounts affected the Occurrence and Ocurr. FTE amounts for both the sponsored and general lines.

Also notice how using the Requested fields to reduce the Occurrence to zero leave only the earned amount in the Cumulative fields.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Period</td>
<td>2006</td>
</tr>
<tr>
<td>Dept ID</td>
<td>6122000000</td>
</tr>
<tr>
<td>Employee ID</td>
<td>963258</td>
</tr>
<tr>
<td>Status</td>
<td>Filled</td>
</tr>
<tr>
<td>First Name</td>
<td>LEIA</td>
</tr>
<tr>
<td>Middle</td>
<td>ORGANAS</td>
</tr>
<tr>
<td>Last Name</td>
<td>SOLO</td>
</tr>
<tr>
<td>Bus Unit</td>
<td>FB000</td>
</tr>
<tr>
<td>Title</td>
<td>999HAE</td>
</tr>
<tr>
<td>Speed Type</td>
<td>BUD</td>
</tr>
<tr>
<td>Account</td>
<td>511100</td>
</tr>
<tr>
<td>Fund</td>
<td>EC</td>
</tr>
<tr>
<td>Dept</td>
<td>6122000000</td>
</tr>
<tr>
<td>Program</td>
<td>1620</td>
</tr>
<tr>
<td>Class</td>
<td>11000</td>
</tr>
<tr>
<td>Project</td>
<td></td>
</tr>
<tr>
<td>Sal Flag 1</td>
<td>50.000</td>
</tr>
<tr>
<td>FTE 1</td>
<td>0.375</td>
</tr>
<tr>
<td>Sal Flag 2</td>
<td>51.000</td>
</tr>
<tr>
<td>FTE 2</td>
<td>0.375</td>
</tr>
<tr>
<td>Cumulative</td>
<td>75,750</td>
</tr>
<tr>
<td>Occurrence</td>
<td>75,750</td>
</tr>
<tr>
<td>orig FTE</td>
<td>0</td>
</tr>
<tr>
<td>Requested</td>
<td>25,250</td>
</tr>
<tr>
<td>Req FTE</td>
<td>0.187</td>
</tr>
<tr>
<td>Comment</td>
<td>HI-DJ, 100% general eff 1M08</td>
</tr>
</tbody>
</table>
Changing Earnings Distribution – One Source to Multiple Sources
Fund Code 10 Split

Path: Budget >> GSU Budget System >> GSU Budget >> Update/Display All
When this screen pops up you have the choice of typing in any of the following fields: Budget Period, Department ID, Original Budget Position Number, Employee ID, and/or Employee Last Name.

Click Search.

Once you find the record you are looking for, double click on the record or press OK when the record is highlighted in blue.

<table>
<thead>
<tr>
<th>Budget Period</th>
<th>Dept ID</th>
<th>Orig Budg Pos #</th>
<th>Empl ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>6122000000</td>
<td>210</td>
<td>9999777</td>
</tr>
</tbody>
</table>
A screen will pop up for the existing position.

For our example this is a picture of the person’s current budget. He has only one earning source.
Place the cursor in the Eff Date field. Click Insert Row.
Change the effective date in the Eff Date field. For our example the person will become split 50/50 between Spectrum and Budget & Planning, two fund code 10 budgets, effective February 1, 2006.

Although this position will be split between two fund code 10 departments, there is no need to adjust the salary fields unless this person is a new hire or this change is taking effect July 1.

To adjust the position in the department that will go from 100% to 50%, decrease the Occurrence amount to reflect the new budget amount. That means you must place the negative amount in the Requested and Req FTE fields.

For our example, this position will earn $40,312 and .79 FTE for the fiscal year. Therefore, we need to reduce the Occurrence amount by $10,938 and .21 FTE.

Then type a comment denoting the action in the Comment field.
Click the save icon.
Next click the red “X” to cancel the record you were working on.
Since we are changing Obi Wan Kenobi’s earnings distribution from 100% BUD, fund code 10 to 50% BUD/SPEC, fund code 10, we need to set up a position in the Spectrum department. In our example we will set up a new position in the Spectrum department.

Click on the green “+” to add a new position.
Once this screen pops up, enter the budget period, department ID, and the next available position number in the Original Budget Position Number field and then click OK.
A new screen will pop up with blank fields.
Enter the employee ID in the Employee ID field.

Select Filled in the Status field.

Enter the employee’s name in the name fields.

Enter the appropriate business unit in the Bus Unit field. For our example the business unit is FB000.

Enter the employee’s title in the Title field.
Enter the chartfield information for the new funding source by either using the Speedtype field or by typing in the fund, department, program, and class. Since this is a fund code 10 budget the Project field is not applicable. Also be sure to enter the account code in the Account field.

When you do a fund code 10 split, it is not necessary to enter information in the salary fields of the new department’s position unless the change took effect July 1 or you are setting up the budget for a new employee.
To set up the budget for the new position, enter the budget amount in the Requested field and the budget FTE in the Req FTE field.

In our example, the employee will earn $10,937 and .22 FTE.

Be sure to type a comment denoting the action in the comment field.
If you notice, there are three tabs listed that represent three panels: GSU Budget, Proposed, and HR Data. Since we are adding a new position you will need to use the HR Data panel.

Go to the HR Data panel by clicking on the HR Data tab.
Enter the type of degree received (if applicable) in the Degree field.

The contract field has four options: Academic, Prof/Staff, Temporary, and YearAcad. Since Obi Wan Kenobi is a GSU staff member we will select Prof/Staff for our example.

You must also fill in the HR position # and the employment date.
Return to the GSU Budget panel by clicking on the GSU Budget tab.
Click the Save icon.
Setting up a Stipend

Path: Budget >> GSU Budget System >> GSU Budget >> Update/Display
When this screen pops up enter the Budget Period and the Department ID, Original Budget Position Nbr., Employee ID, and/or Employee Last Name to search for the existing position.

Once you find the record you are looking for double click on the name or press OK when the name is highlighted in blue.
That will bring up this screen.
While the cursor is in the Eff Date field, click Insert Row.
Type in a new effective date that corresponds to the date the stipend is to begin. There is no need to adjust the existing budget line since stipends don’t affect the employee’s earnings budget.

Place the cursor in the Fund field. Click Insert Row.
Enter chartfield information for the stipend by using the Speedtype field or by typing in the Fund, Dept, Program, Class, and Project.

Be sure to type the account code into the Account field. To setup the budget for the stipend, enter the budget amount in the Requested field. Stipends do not have FTE so there is no need to put anything in any of the FTE fields. Then type a comment denoting the action in the Comment field.
Remember: If you don’t know the account code, you can use the drop down menu arrow or you can type in a number and hit Shift-F4 to see a list of valid accounts.
Before you save, be sure to put a comment in the Comment field of the existing budget line also.

Do that by using the inner scroll to view either earnings source.
Click the Save icon.

If you use the inner scroll you can view the earnings detail.
Terminating an Employee from an Ongoing General Funds Position

Path: Budget >> GSU Budget System >> GSU Budget >> Update/Display

When the Update/Display screen pops up enter the Budget Period and the Department ID, Original Budget Position Number, Employee ID, and/or Employee Last Name to search for the existing position you would like to adjust.

Once you find the record you are looking for double click on the name or press OK when the name is highlighted in blue.
The screen of the selected record will pop up.
Place the cursor in the Eff Date field. Click Insert Row.
Change the effective date.

Status field remains “Filled” unless you are either getting rid of the position forever or terminating a non-general funds position.

Type the amount earned in the Earnings field. Be sure to type earned FTE in the Earn FTE field. Then type a comment denoting the action in the Comment field.
Go to the HR Data panel by clicking on the HR Data tab.
Enter the termination date in the Termination Date field.
Return to the GSU Budget panel by clicking on the GSU Budget tab.
Click the Save icon.
Next, set up a vacant position.

Place the cursor in the Eff Date field. Click Insert Row.
Change the Status from Filled to Vacant. Then type a comment in the Comment field denoting the action.

There is no need to adjust the Occurrence amount unless you are transferring money from the vacant line.
Go to the Proposed panel. Delete everything from this panel except the effective date.
Go to the HR Data panel. Delete everything from this panel except the position number and the contract.
Click the Save icon.
Terminating a Sponsored Position or a Position Terminating Forever

Path: Budget >> GSU Budget System >> GSU Budget >> Update/Display
When the Update/Display screen pops up enter the Budget Period and the Department ID, Original Budget Position Number, Employee ID, and/or Employee Last Name to search for the existing position you would like to adjust. Click Search.
Once you find the record you are looking for double click on the name or press OK when the name is highlighted in blue.

<table>
<thead>
<tr>
<th>Budget Period</th>
<th>Dept ID</th>
<th>Orig Budp Pos #</th>
<th>Empl ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>612200000</td>
<td>004</td>
<td>963268</td>
</tr>
<tr>
<td>2006</td>
<td>612200000</td>
<td>002</td>
<td>997854</td>
</tr>
<tr>
<td>2006</td>
<td>612200000</td>
<td>210</td>
<td>998877</td>
</tr>
</tbody>
</table>
The screen will pop up for the existing position.
Place the cursor in the Eff Date field and click Insert Row.
Change the effective date.

The Status field remains Filled.

Type the amount earned in the Earnings and earned FTE fields.

Then type a comment denoting the action in the Comment Field.
Go to the HR Data panel by clicking on the HR Data tab.
Enter the termination date in the Termination Date field.
Return to the GSU Budget panel by clicking on the GSU Budget tab.
Click the Save icon.
Next, set up a vacant, terminated position by placing the cursor in the Eff Date field. Click Insert Row.
Enter the effective date in the Effective Date field.

Change the status from filled to terminated. Delete data from the Employee ID and Name fields.

Since we are terminating a sponsored position we must also zero out the Occurrence amount. The sponsored funds return to the grant once someone is terminated. Use the requested fields to reduce the occurrence to zero.

Then type a comment in the Comment field denoting the action.
Go to the Proposed panel. Delete everything from this panel.
Go to the HR Data panel. Delete everything from this panel except the contract.
Click the Save icon.
Hours without Pay/Leave without Pay

Go to the existing position that will have hours without pay (HWOP) or leave without pay (LWOP) adjustment.

Path: Budget >> GSU Budget System >> GSU Budget >> Update/Display
Enter the Budget Period and the Department ID, Original Budget Position Nbr., Employee ID, and/or Employee Last Name to search for the existing position you would like to adjust.

Once you find the record you are looking for double click on the name or press OK when the name is highlighted in blue.
A screen will pop up for the existing position.

Place the cursor in the Eff Date field and click Insert Row.

Change the effective date.
Enter the amount and FTE of HWOP/LWOP in the Requested and Req FTE fields. Type a comment in the Comment Field.
In this example, this person also has a stipend. So the stipend must be adjusted.
Click the Save icon.

Use the inner scroll bar to view the earnings detail.
Vacation Pay Out

Note: The vacation payout budget should always be setup in positions 500-599. For the very first vacation payout always make effective date beginning of FY.

If the vacation position is already setup, then use Update/Display to go to the existing position. If you are creating a new vacation position then use Add to set it up.

In our example we are creating a new position.

Path: Budget >> GSU Budget System >> GSU Budget >> Add

Next, enter the Budget Period, Department ID, and the Original Budget Position Number field and then click OK.
A new screen will pop up with blank fields.
Set the effective date to July 1 in the Effective Date field.

Leave Employee ID, Status, First Name, Middle, Last Name, Title, Salary 1, FTE1, Salary 2, FTE2 fields blank.

Be sure to enter the correct business unit in the Bus Unit field. Then type in the chartfield information for the vacation pay out by using the Speedtype field or by typing in the Fund, Dept, Program, Class, and Project.
Next, type the account code in the Account field.

To setup the budget for the vacation pay out, enter the budget amount in the Requested field. They type a comment that states the person’s name and the date of the person’s vacation.
Click the Save icon.
When you need to add a different person place the cursor in the Eff Date field and then click Insert Row. Type a new effective date.
To setup the budget for the vacation pay out, enter the budget amount in the Requested field. They type a comment that states the person’s name and the date of the vacation.
Click the Save icon.

Use the outer scroll bar to view the position history.
Amended Budget Report

Path: Go >> Georgia State University
Path: When the screen refreshes go to Budget >> Amended Budget Report >> Add

Note: Use Update/Display when you already have criteria saved under a name.
Once the prompt pops up, choose a name for the report and type it in the Run Control ID field. Click OK.

Add -- Amended Budget Report

Run Control ID: [YOUR_NAME]

OK

Cancel
When this screen pops up you have the choice of typing in any one of the following fields: Budget Period, Department, or Business Unit.

You must enter a value for the quarter of the fiscal year (not the calendar year), 1-4, in the Quarter field. If you enter four in the Quarter field you will get a report that gives the latest information from the first quarter to the fourth quarter.

If you would like to include fringe benefits in the report, be sure to click the box.
Next click the traffic light closest to the save button to run the report.

Once this screen pops up you can either view the report or print the report.
To view the report from a window on Citrix set the Run Location to Client. Set the Output Destination to File. In the File/Printer field type, “d:/tmp -ziv.” Click OK.
You will get a report that looks like this.
To print the report to a network printer, set the Run Location to Server.
In the Run Location section, choose PSUNX from the Server drop down menu.
Set the output destination to Printer.
In the File/Printer field type the destination of your network printer. For our example the network printer’s destination looks like this: /tmp/+p-dbudplan-hpc5550.

Note: These are the definitions for the codes in the File/Printer field used to print the Amended Budget Report.

- +P: Goes to the printer
- -d: Report destination
- dbudplan-hpc5550: Budget & Planning printer id (You need to know the name of your printer’s network ID to print this document)

Click OK.
Other Budget Reports

There are also other reports that you can print in addition to the Amended Budget Report.

Amended Budget Report without (or with) Fringes

Path: Go >> Georgia State University
Path: When the screen refreshes go to Budget >> Other Budget Reports >> Add

Note: Use Update/Display when you already have criteria saved under a specific name.
Once this screen prompt pops up, choose a name for the report and type it in the Run Control ID field. Click OK.
When this screen pops up you must enter the Budget Period. The Department ID can be any variation of what you may be looking for. The “%” can go at the beginning or the end of the department variable. The “As of Date” will default to the current date. You can change the “As of Date.”

Examples:
Next, click the traffic light closest to the save button to run the report.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operator ID</td>
<td>FINDMB</td>
</tr>
<tr>
<td>Run Control ID</td>
<td>AMD_BUD_NO_FRINGES</td>
</tr>
<tr>
<td>Budget Period</td>
<td>2006</td>
</tr>
<tr>
<td>Department ID</td>
<td>512222000</td>
</tr>
<tr>
<td>As of Date</td>
<td>02/17/2006</td>
</tr>
</tbody>
</table>
Once this screen pops up, highlight the Amend. Bud Rpt without Fringes option. To run the Amended Budget Report with Fringes you would choose the Amend. Bud Rpt with Fringes option. In our example we are running an Amended Budget Report without Fringes.

Since this is a Crystal report, be sure to check that the Run Location is set to Client and that the Output Destination is set to Window.

Click OK
This is a glimpse of what the report will look like. You can also print this report from this screen.

<table>
<thead>
<tr>
<th>General Fund: unrestricted</th>
<th>Class</th>
<th>Personal Services</th>
<th>EFT</th>
<th>Travel</th>
<th>Supplies</th>
<th>Equipment</th>
<th>Non-Personal Department Services</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Operations</td>
<td>1100</td>
<td>432,000</td>
<td>5220</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>432,000</td>
</tr>
<tr>
<td>Total</td>
<td>432,000</td>
<td>5220</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>432,000</td>
</tr>
</tbody>
</table>

| General Operations/Total  | 432,000| 5220              | 0   | 0      | 0        | 0         | 0                                | 432,000|

<table>
<thead>
<tr>
<th>General Fund: unrestricted</th>
<th>Total</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsored</td>
<td>432,000</td>
<td>5220</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>432,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General Fund: unrestricted</th>
<th>Total</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsored</td>
<td>75,300</td>
<td>2700</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>75,300</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>General Fund: unrestricted</th>
<th>Total</th>
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<th></th>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>75,300</td>
</tr>
</tbody>
</table>
Original Budget Report with (without) Fringes

Path: Go >> Georgia State University
Path: When the screen refreshes go to Budget >> Other Budget Reports >> Add

Note: Use Update/Display when you already have criteria saved under a specific name.
Once this screen prompt pops up, choose a name for the report and type it in the Run Control ID field. Click OK.
When this screen pops up you must enter the Budget Period. The Department ID can be any variation of what you may be looking for. The “%” can go at the beginning or the end of the department variable. The “As of Date” will default to the current date. You can change the “As of Date.”

Examples:
Next, click the traffic light closest to the save button to run the report.
Once this screen pops up, highlight the Orig. Bud Rpt without Fringes option. To run the Original Budget Report with Fringes you would choose the Orig. Bud Rpt with Fringes option. In our example we are running an Original Budget Report without Fringes.

Since this is a Crystal report, be sure to set the Run Location to Client and the Output Destination to Window.

Click OK
This is a glimpse of what the report will look like. You can also print this report from this screen.
Proposed Budget Report with (without) Fringes

Path: Go >> Georgia State University
Path: When the screen refreshes go to Budget >> Other Budget Reports >> Add

Note: Use Update/Display when you already have criteria saved under a specific name.
Once the prompt pops up, choose a name for the report and type it in the Run Control ID field. Click OK.
When this screen pops up you must enter the Budget Period. The Department ID can be any variation of what you may be looking for. The “%” can go at the beginning or the end of the department variable. The “As of Date” will default to the current date. You can change the “As of Date” if necessary.

Examples:
Next, click the traffic light closest to the save button to run the report.
Once this screen pops up, highlight the Prop. Bud Rpt without Fringes option. To run the Proposed Budget Report with Fringes you should choose the Prop. Bud Rpt with Fringes option. In our example we are running a Proposed Budget Report without Fringes.

Since this is a Crystal report, the Run Location must be set to Client and the Output Destination must be set to Window.

Click OK.
This is a glimpse of what the report will look like. You can also print this report from this screen. To print, click the print icon.