

**PeopleSoft**

**KUMC**

**Budget Information  
Procedural Reference**

## Table of Contents

	Page
Overview .....	3
Displaying the Navigation Icons .....	4
OOE Budgets .....	5
Seasonal Line Budgets .....	7
Position Budgets .....	9
Demographics .....	11
Appendix	
Budget Codes .....	13
Assistance .....	14

## OVERVIEW

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### **General Information**

The Budget System stores two sets of data for all funding information.

The first table is titled "Base" which represents data in real time. Base will always be the top section of a funding panel. The second table is titled "Oper" which represents data as of the first day of the fiscal year. "Oper" will always be the bottom section of a funding panel.

The panel layout is the same regardless of whether you are displaying a regular position, a seasonal line, or an OOE record.

### **OOE**

Other Operating Expenditures (non-salary dollars) position numbers are all 6 digits in length and begin with the prefix 77.

Valid position numbers are:

770000 – Shrinkage

772000 – Regular OOE

772005 – Telephone / Networking

775000 – Stipends

The Budget Code (BC) is tied to the position number. Budget Code designates the type of position (e.g., 20 = regular unclassified, 30 = regular classified). For a complete list see Appendix.

The Account Code (Object Code) is also tied to the position number. The Account Code identifies the type of dollars.

Valid Account Codes are:

1005 – Salary and Wages

2000 – OOE

2005 – Telephone and Networking

### **Seasonal Lines**

A Seasonal Line is a placeholder for all uncommitted dollars within a department. Not every department has a seasonal line. The fields and information are the same as all other funding panels with the exception of displaying the associated fringe benefit fields.

### **KU Position Budgets**

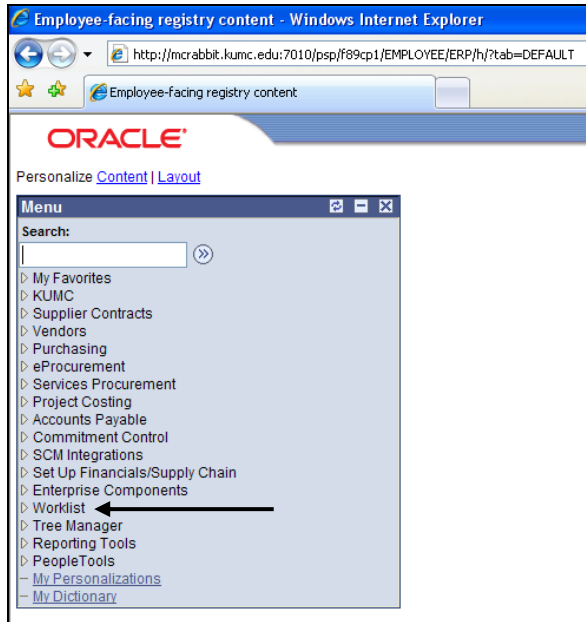
Use KU Position Budgets to locate permanent funding for a specific position/person. The Account Code field on this panel is the same as SpeedType. The BC field is the key field because a specific SpeedType may be listed multiple times. The BC must be different on each line. This distinguishes the dollar amounts between regular salary, admin caps, release dollars, etc.

### **Demographics**

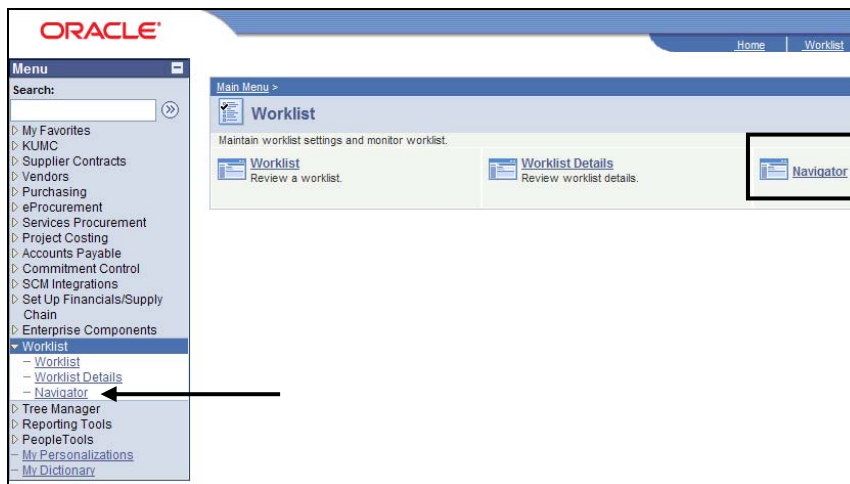
The Demographics panel displays personal information on the incumbent – name, job code, current comp rate, current FTE, etc. If the Name field is blank, the position is vacant. The demographic information for filled positions is updated daily.

## DISPLAYING THE NAVIGATION ICONS

### Navigation



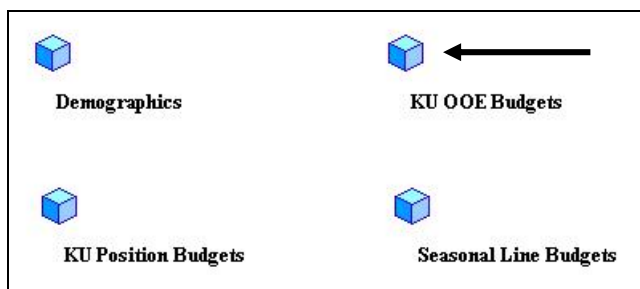
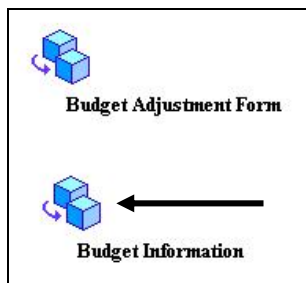
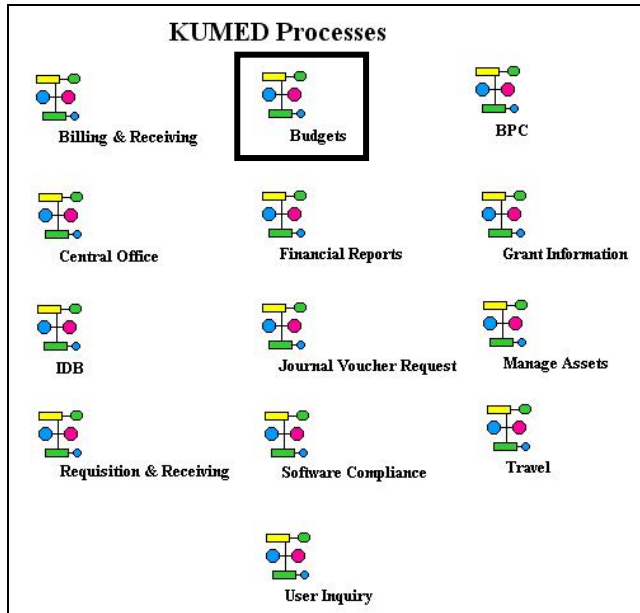
1. Click **Worklist** in the menu.



2. Click **Navigator** icon or menu item.

# OOE BUDGETS

## Navigation



1. Click **Budgets** icon.

2. Click **Budget Information** icon.

3. Click **KU OOE Budgets** icon.

# OOE BUDGETS

## Selection Criteria

### OOE Budgets

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Department: begins with

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)

Ku Bd Ooe Fndg Pnl

Org: 60101      OOE Budgets

Base

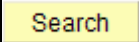
SpeedType:	BC:	Position:	Total Amt:	Account:
		770000		


Oper

SpeedType:	BC:	Position:	Total Amt:	Account:
		770000		1005

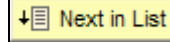
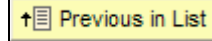
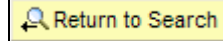
Save    Return to Search    Previous in List    Next in List

**Step 3** BC = Budget Code  
Account is Object Code – 4-digit number to categorize expenditure type (1005 – Salary and Wages, 2000 – OOE, 2005 – Telephone and Networking)

1. Enter 5-digit **Department** number.
2. Click .

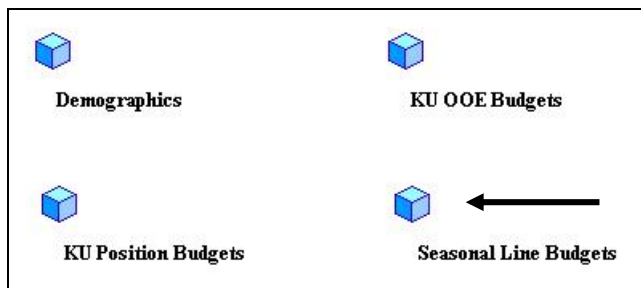
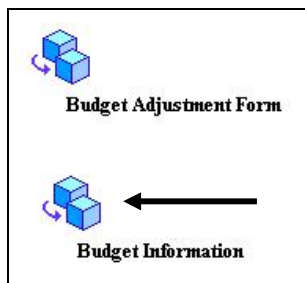
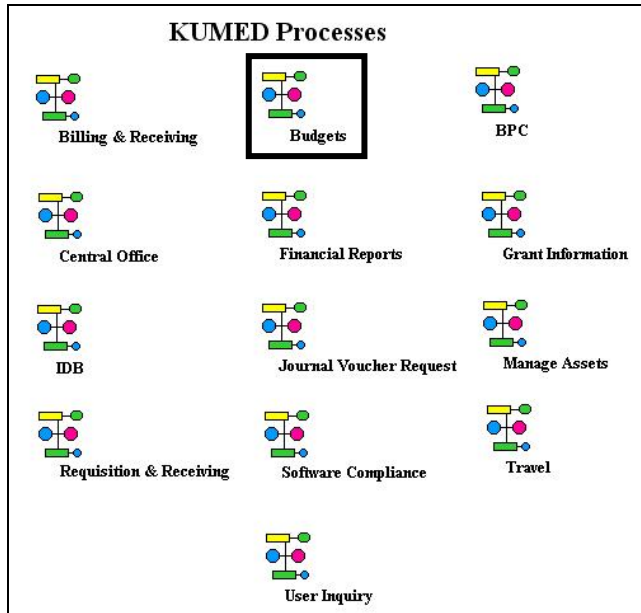
3. OOE position numbers are all 6 digits and begin with the prefix 77. Position 770000 represents all Shrinkage lines; 772000 numbers represent Contractual Services lines, and 772005 represents the department's Telephone line. 

4.

To...	Click...
View data on next position	
View data on previous position	
View list of positions	
Return to Navigation icons	<a href="#">KU_PROCESSES</a>

# SEASONAL LINE BUDGETS

## Navigation



1. Click **Budgets** icon.

2. Click **Budget Information** icon.

3. Click **Seasonal Line Budgets** icon.

## SEASONAL LINE BUDGETS

### Selection Criteria

#### Seasonal Line Budgets

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Position Number:    
Department:

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)

**Step 1** Can enter 6-digit position number if known.

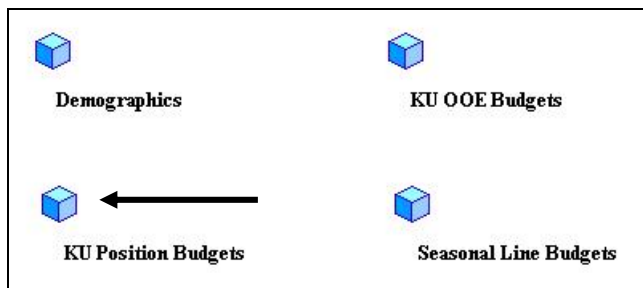
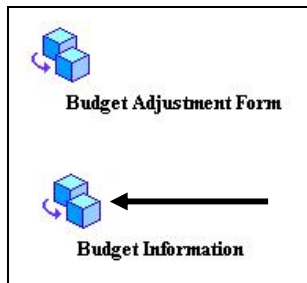
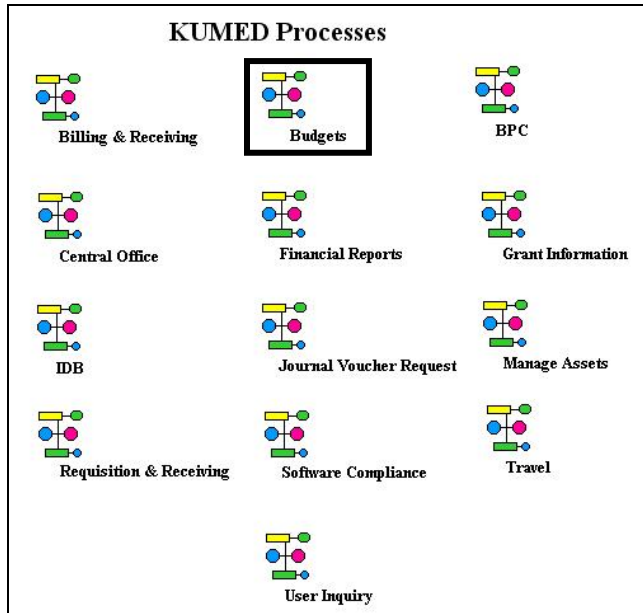
Ku Bd Season Line											
Position:	003036	Org:	60101							Find   View All First 1 of 1 Last	
Base Budget											
SpeedType:	BC:	Fund Code:	KU FTE:	Total Amt:	FICA:	Retirement:	Health:				
APP60101	36	0503		37.00	3.00	3.00					
Account:	1005	WComp:		UComp:		SickPay:					
Oper Budget											
SpeedType:	BC:	Fund:	FTE:	Total Amt:	FICA:	Retirement:	Health:				
APP60101	36	0503		37.00	3.00	3.00					
Account:	1005	WComp:		UComp:		SickPay:					

1. Enter 5-digit **Department** number.
2. Click .
3. Click desired position.

4. Use the navigation bar     to view additional lines, if necessary.

# POSITIONS BUDGETS

## Navigation



1. Click **Budgets** icon.

2. Click **Budget Information** icon.

3. Click **KU Position Budgets** icon.

# DEMOGRAPHICS

## Selection Criteria

### KU Position Budgets

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Position Number: begins with

Include History

Search

Clear

[Basic Search](#)

[Save Search Criteria](#)

**Step 1** Positions are not tied to a specific department.

Ku Bd Pos Fndg

Position Number: 000005

Base					
Scroll Area					
SpeedType:	BC:	Position:	KU FTE:	Total Amt:	Department:
APP35501	20	000005	50.00	18270.00	35501

Oper					
Scroll Area					
SpeedType:	BC:	Position:	KU FTE:	Total Amt:	Department:
APP35501	20	000005	50.00	18270.00	35501

1. Enter 6-digit **Position Number**.

2. Click **Search**.

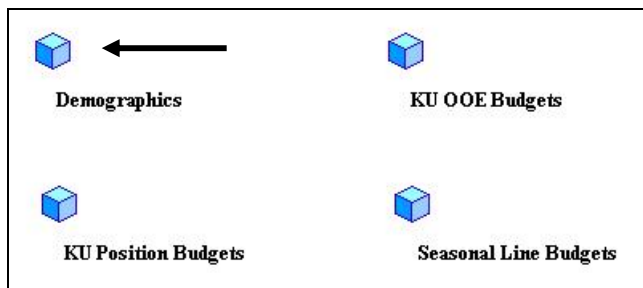
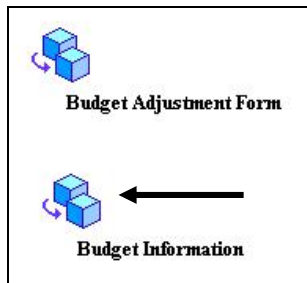
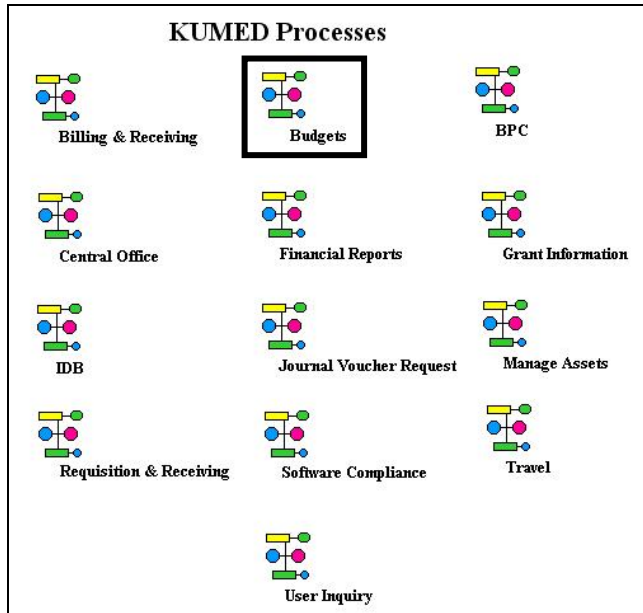
3. Use navigation bar **Find | View All** **First**  **Last** to view additional lines, if necessary.

4.

To...	Click...
View another position	<b>Return to Search</b>
Return to Navigation icons	<a href="#">KU PROCESSES</a>

# DEMOGRAPHICS

## Navigation



1. Click **Budgets** icon.

2. Click **Budget Information** icon.

3. Click **Demographics** icon.

# DEMOGRAPHICS

## Selection Criteria

### Demographics

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

SetID:

Position Number:

Include History

[Basic Search](#)

### Ku Bd Demograph

SetID: KUMED Comments:  Regular

Position: 000005 Prime Org#: 35501 Empl Class: U  Temp

Name:  Full Time

SSN: EmpID:  Part Time

Job Code: 082700 Job Code Descr: Coordinator

% Time Worked: 50.00 Comp Rate: Sal Grade: 01 Sal Step: 0

Plan Type: Deduction Begin Date:  GTA Indicator

#### Employee's Orgs

Scroll Area   1 of 1

Org: 35501 Area: 00410

1. Enter 6-digit Position Number.

2. Click .

3. Use navigation bar   1 of 1  to view additional lines, if necessary.

4.

To...	Click...
View another position	<input type="button" value="Return to Search"/>
Return to Navigation icons	<a href="#">KU_PROCESSES</a>

## APPENDIX

### Budget Codes

Budget Codes	
Code	Description
10	Housestaff Regular
11	Housestaff Seasonal
12	Special Int Med HS positions
13	New KU Hospital Positions
14	FY09 KUH Funded Lines
20	Unclassified Regular
21	Unclassified Administrative Cap
22	Unclassified Supplemental
23	Unclassified Hospital Reimbursement
24	Unclassified Seasonal
25	Unclassified Temporary
26	Unclassified Distinguished Professor
27	Unclassified Lawrence Payroll
28	Unclassified Flexible Compensation
29	Unclassified Release Time
30	Classified Regular
31	Classified Temporary
32	Classified Police Retirement Program
33	Classified Hospital Reimbursement
34	Classified Seasonal
35	Classified Shift Differential
36	Classified Overtime
38	Classified Longevity
39	Classified N2 Differential
40	Permanent Student Help
41	Students Temporary
51	Health Care Worker Temporary
52	Health Care Worker Seasonal
53	Health Care Worker Hospital Reimbursement
54	Health Care Worker No Nurse
55	Health Care Worker Nurse
60	OOE – Regular and Telephone & Networking
90	Student Aids / Awards

## APPENDIX

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### Assistance

#### **Using PeopleSoft Budget Panels**

Questions regarding how to utilize the PeopleSoft Budget panels should be directed to PeopleSoft Support at ext. **8-1121**.

The office is usually staffed from 8:00 AM to 4:30 PM. In the event no one is available to assist, you may leave your question on the office Audix voice mail system, and we will return your call.

#### **Budget Policy or Data**

Policy questions regarding Budget Policy or data should be directed to your assigned Budget Analyst in the Budget Office, either Karen Avey at ext. 8-2001, Richard Murrell at ext. 8-5269. If you are unable to reach your assigned Budget Analyst, you may call extension 8-5225 to leave a message.

The office is usually staffed from 8:00 AM to 5:00 PM. In the event no one is available to assist, you may leave your question on the office Audix voice mail system, and they will return your call.