Fixed Costs Task Lists

**Fixed Costs Task List:**

Many users must also participate in NKU’s Fixed Cost process, to project the changes in budget for certain fund center/commitment item combinations. If you are responsible for Fixed Cost, you will see the Fixed Cost Task List on your PBCS home screen.

From the Planning and Budgeting Cloud Service Workspace screen, click on **Simplified Interface** under the **Planning and Budgeting Service** tab:
On the next screen, click on the Tasks icon:

![Tasks icon](image)

On the next screen, click on the tree view on the right-hand corner of the screen to access the tasks under the task list.

The next screen appears with the Fixed Costs folder. Click on the arrow next to Fixed Costs. This expands to show the tasks under **Fixed Costs**.

**Tasks: All Task Lists**

Filter: All

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Fixed Costs]</td>
</tr>
</tbody>
</table>

The following tasks appear under **Fixed Costs**. The red icon under **Status** indicates that the task has not been completed. Once the task is complete, then a green icon appears. Each task links to a form that is to be completed and then
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Approved.

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>Fixed Costs</td>
<td>●</td>
</tr>
<tr>
<td>Fixed Cost Form</td>
<td>●</td>
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<tr>
<td>Review Fixed Costs</td>
<td>●</td>
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</tbody>
</table>

**Fixed Cost Form:**

- This form allows users to enter projected fixed cost budget adjustments, both positive and negative.
- Users must select each relevant Fund Center from the page view drop-down menus, and then enter the total budget change by Commitment Item.
- Enter only whole dollar amounts.
- Editable cells are highlighted in YELLOW (default settings, Smartview)
- Full instructions can be found here: [http://budgetoffice.nku.edu/aboutbudgetprocess/process.html](http://budgetoffice.nku.edu/aboutbudgetprocess/process.html)
- **Data Definitions:**
  - Column A: Functional Area
  - Column B: Fund (The majority of budgeted items are in the Unrestricted Current Fund, 011000100)
  - Column C: Commitment Item, alias (with suppress)
  - Column D: Next Year Baseline Budget (with suppress)
  - Column F: Next Year Fixed Cost Adjustment. <Perform all data entry into this field.>
  - Column G: Formula member, Baseline Budget + Requested Fixed Cost Adjustment.

To access the **Fixed Cost Form**, click on the link named **Fixed Cost Form**, under **Fixed Costs**:
The following screen appears:

Perform data entries in the highlighted column for this form. Once data is entered, click on the icon located at the top of the screen.

If you need to access the next task under Fixed Costs, click on the icon located at the top of the screen.

If you do not need to access another form under Fixed Costs, click on the icon located at the top of the screen.

Review Fixed Costs:

Review the impact that fixed costs has on your baseline budget.

Changing Fund Centers within each form:

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At the top of the screen, click on the current fund center:

**Fund Center**
**FC_235040001 : History & Geography (235040001)**

The following screen appears. There are a couple ways to access another fund center.

1. In the “Search Fund Center” field, type the **fund center name**, for example “Physics and Geology” or the **fund center number** by entering “FC_<fund center number>“ and clicking **Enter**. Then, the fund center number will appear under “Results”.

2. A list of fund centers will also appear for which the user has access. Hover over the fund center of your choice. For example below, hover over FC_235040010 (Geography Lab). Then **click ON the light blue check mark** next to fund center to choose it. This will turn into a **dark blue checkmark**. Once check mark is dark blue, click **OK**.

![Select a Member](image)

After clicking OK, the fund center will change at the top of the screen.

**Fund Center**
**FC_235040010 : Geography Lab (235040010)**

However, to see the correct data for this fund center, **click the go arrow at the top of the screen**.

**Complete**
Fixed Costs Task Lists

Once data entry and/or revision is complete after processing the fund centers necessary within a form, click on box next to complete located at the top right hand corner of the form. □ Complete A checkmark will appear in the box. The task is then complete.

Then click Close to return to the Task Lists screen. Click Refresh to view the status of the task. The green check and status next to the form on the task lists screen, indicate that the form is complete. See example below:

Compensation Budget - Request

Comments, Supporting Detail and Attachments

To access these features, position your cursor in the editable cell and right click.

Comments:

Comments is useful for providing more detail regarding the data entry on a cell.
Click on **Comments**. The following screen appears.
Enter information in the comments box and click **Post**.

**Comments**

Enter information in comments

![Comments dialog box]

Click on **Supporting Detail**. The following dialog box appears. Click on **Actions** and then **Add child**

**Supporting Detail**

No data to display

![Supporting Detail dialog box]

The following dialog box appears. Rename the title in the box named **Untitled**. Click in the cell under **Operator** to choose the operating function needed. Then add the $ amount under the **FYxx Budget Request** column. Once this amount is entered, it automatically populates in the **Total** column.
A child must be added first, in order to add a sibling. To add a sibling, click on the cell where a data entry has been made for child. Click on Supporting Detail. Click on Actions and then Add sibling.

A second box appears under the first. Input the information for sibling (test 1). Once this amount is entered, it automatically calculates the cells together and populates in the Total column.

After clicking Save, the $ amount is automatically populated in the cell on the form.
Click on **Supporting Detail**. The following dialog box appears. Click on **Browse...** to access your file and then click **Upload**.

**Attachments**

Browse... No file selected.

Upload Close