

DEPAUL UNIVERSITY

OFFICE OF THE
VICE PRESIDENT FOR FINANCE



2018-19 DEPAUL BUDGET PLANNING SYSTEM USER DOCUMENTATION

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1. BUDGET PLANNING SYSTEM ACCESS

The budget planning system is accessible via Campus Connection. For budget managers that are responsible for specific department budgets via direct ownership or by proxy, access will be set up automatically. For budget managers that are set up as delegates, the following steps need to be taken to provide access:

1. Launch the Campus Connection log-in page (<https://campusconnect.depaul.edu>)
2. Enter your Campus Connection User ID and Password, then click 'Sign In'
3. Navigate to the Budget Mgr Delegates Page by selecting 'DePaul Financial System → Mail Menu → Manager Self Service → Budget Managers → Budget Manager Delegation'
4. Select a DEPTID and click 'Search'

The following page will be displayed:

Dept ID	Name	Employee Status	Appointment	Invoice Activity	Budget Elements	Employee Payment Request	Financial Activity Information	Position Incumbent No. Salary	Position Control with Salary	Scholarship Information	Gift Activity	Intecom Detail	Effective Date	Updated By
1			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	09/01/2016	

5. Check the 'Budget Planning' checkbox for each delegate and click 'Save'

2. LOGIN WITH CAMPUS CONNECTION USER ID

1. Launch the Campus Connection log-in page (<https://campusconnect.depaul.edu>)
2. Enter your Campus Connection User ID and Password, then click 'Sign In'
3. Navigate to the Budget Planning Application by selecting 'DePaul Financial System → Main Menu → DePaul Budget Planning → DePaul Budget Entry'

The Budget Summary page will be displayed with all of the DEPTIDs within the Budget Manager's responsibility:

Need help? Contact Budgets & Operational Reporting at:

- Phone: 312.362.6321 • E-mail: controller@depaul.edu • Web Site: <http://financialaffairs.depaul.edu>

Search

Show all columns

Download to Excel

DePaul Budget Planning ---- Budget Summary

This page provides a summary by DEPTID. To enter proposed budget amounts, click on a DEPTID to display the Budget Detail page.

Fund ALL

		16/17 Base	16/17 Final	16/17 Actual	17/18 Base	17/18 Final	18/19 Proposed		
Fund Code	DEPTID	DEPTID Description	Budget Manager	18/19 Proposed Revenue	18/19 Proposed Financial Aid	18/19 Proposed Expenses	18/19 Proposed Net	Comments	Done
100	108100	Instl. Diversity & Equity	Perales, Jose			\$730,465.00	\$730,465.00		<input checked="" type="checkbox"/>

Budget Summary Totals:

	16/17 Original	16/17 Base	16/17 Final	16/17 Actual	17/18 Original	17/18 Base	17/18 Final	18/19 Proposed
Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Financial Aid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Net Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Salaries & Benefits	\$536,701.19	\$570,212.79	\$561,445.99	\$616,815.81	\$724,662.10	\$724,662.10	\$724,662.10	\$723,165.00
Departmental Expenses	\$7,324.00	\$7,324.00	\$7,324.00	\$653.85	\$7,324.00	\$7,324.00	\$7,324.00	\$7,300.00
Non-Departmental Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Expenses	\$544,025.19	\$577,536.79	\$568,769.99	\$617,469.66	\$731,986.10	\$731,986.10	\$731,986.10	\$730,465.00
Net Total	\$544,025.19	\$577,536.79	\$568,769.99	\$617,469.66	\$731,986.10	\$731,986.10	\$731,986.10	\$730,465.00

Separate tabs to view current year budget, prior year actual and prior year budget as reference

Check 'Done' checkbox for each DEPTID once budget entry has been completed

Add a comment

Mouse-over to view existing comments

Click on a DEPTID to view the Budget Detail page (to enter proposed budget amounts for all accounts within the DEPTID)

Aggregate totals for all DEPTIDs displayed are shown here

If the fund code filter is applied, these totals are updated for the selected fund

3. PROPOSED BUDGET DATA ENTRY FOR MULTIPLE ACCOUNTS

1. Click on a DEPTID on the Budget Summary page

A page will be displayed showing account-level detail for the DEPTID selected:

DePaul Budget Planning --- Budget Detail

Enter budget amounts for accounts in the Proposed column, then click Save. [Search](#) [FAQ](#)

[Back to Budget Summary](#)

Account Code	Fund Code	DEPTID	Program Code	Class Fund	Project	DEPTID Description	Budget Manager	Account Description	16/17 Base	16/17 Final	16/17 Actual	17/18 Base	17/18 Final	18/19 Proposed	Comments	All Comments
542100	100	102108	00000	IS		Catholic Intellectual Traditio	Paulson, Valerie D	Benefits Staff	\$121.00	\$121.00		\$121.50	\$121.50			
552820	100	102108	00000	IS		Catholic Intellectual Traditio	Paulson, Valerie D	Books-Library	\$3,500.00	\$3,500.00		\$3,500.00	\$3,500.00			

DEPTID 102108 Totals:

	16/17 Original	16/17 Base	16/17 Final	16/17 Actual	17/18 Original	17/18 Base	17/18 Final	18/19 Proposed
Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Financial Aid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Net Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Salaries & Benefits	\$118.63	\$121.50	\$121.50	\$0.00	\$121.59	\$121.59	\$121.59	\$0.00
Departmental Expenses	\$3,500.00	\$3,500.00	\$3,500.00	\$0.00	\$3,500.00	\$3,500.00	\$3,500.00	\$0.00
Non-Departmental Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Expenses	\$3,618.63	\$3,621.60	\$3,621.60	\$0.00	\$3,621.59	\$3,621.59	\$3,621.59	\$0.00
Net Total	\$3,618.63	\$3,621.60	\$3,621.60	\$0.00	\$3,621.59	\$3,621.59	\$3,621.59	\$0.00

2. Enter budget amounts for accounts in the '18/19 Proposed' column, then click Save

Tuition Income, Administrative/Personal Withdrawals, Endowment Earnings and Benefits (accounts 400100, 400105, 400106, 400140, 542100 and 542150 respectively) are displayed as read-only values. The system will calculate benefits automatically based on the salary amounts that are budgeted.

4. ADD ACCOUNT

1. Click the 'Add Account' button at the bottom of the page

A new line will be added to the bottom of the grid.

2. Select a new account to add from the Account drop-down list
3. Select a program code for the new account ('00000' is the default value)
4. Enter a budget amount in the '18/19 Proposed' column for the new account, then click 'Save'

Need help? Contact Budgets & Operational Reporting at:

• Phone: 312.362.6321 • E-mail: controller@depaul.edu • Web Site: <http://financialaffairs.depaul.edu>

DePaul Budget Planning ---- Budget Detail

Enter budget amounts for accounts in the Proposed column, then click Save. [Search](#) [FAQ](#)

[Back to Budget Summary](#)

Account Code	Fund Code	DEPTID	Program Code	Class Field	Project	DEPTID Description	Budget Manager	Account Description	16/17 Base	16/17 Final	16/17 Actual	17/18 Base	17/18 Final	18/19 Proposed	Comments	All Comments
102108	100	102108	00000	IS		Catholic Intellectual Traditio	Paulson,Valerie D	Benefits Staff	\$121.00	\$121.00		\$121.59	\$121.59			
						Catholic Intellectual Traditio	Paulson,Valerie D	Books-Library	\$3,500.00	\$3,500.00		\$3,500.00	\$3,500.00			

Look up Account Code (Alt+F5)

Cancel Add Account Save

DEPTID 102108 Totals:

	16/17 Original	16/17 Base	16/17 Final	16/17 Actual	17/18 Original	17/18 Base	17/18 Final	18/19 Proposed
Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Financial Aid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Net Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Salaries & Benefits	\$118.63	\$121.60	\$121.60	\$0.00	\$121.59	\$121.59	\$121.59	\$0.00
Departmental Expenses	\$3,500.00	\$3,500.00	\$3,500.00	\$0.00	\$3,500.00	\$3,500.00	\$3,500.00	\$0.00
Non-Departmental Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Expenses	\$3,618.63	\$3,621.60	\$3,621.60	\$0.00	\$3,621.59	\$3,621.59	\$3,621.59	\$0.00
Net Total	\$3,618.63	\$3,621.60	\$3,621.60	\$0.00	\$3,621.59	\$3,621.59	\$3,621.59	\$0.00

5. ADD DEPTID-LEVEL COMMENTS

1. Click the Comments icon for a DEPTID on the Budget Summary page

The following screen will appear:

DePaul Budget Planning ---- Comments

DEPTID: 102108 Account Code: 542100 Program Code: 00000

Fund Code: 100 Class Field: IS Project:

Comment:

Update History:

User ID	Date/Time Entered	Comment Text
1		

Save Cancel

2. Enter text in the Comment box and click 'Save'

The comment will now be saved.

6. ADD ACCOUNT-LEVEL COMMENTS

1. Click the Comments icon for an account on the Budget Detail page

A separate page will appear for entering account-level comments.

2. Enter text in the Comment box and click 'Save'

The comment will now be saved.

Need help? Contact Budgets & Operational Reporting at:

- Phone: 312.362.6321 • E-mail: controller@depaul.edu • Web Site: <http://financialaffairs.depaul.edu>

7. FILTER LIST OF DEPTIDS BY FUND CODE

1. Navigate to the Budget Summary page
2. Select a fund code number (e.g. “100”) from the fund code filter drop-down list

The list of DEPTIDs will now only show DEPTIDs of the selected fund. Budget Summary totals will also be updated to show totals for DEPTIDs with the selected fund.

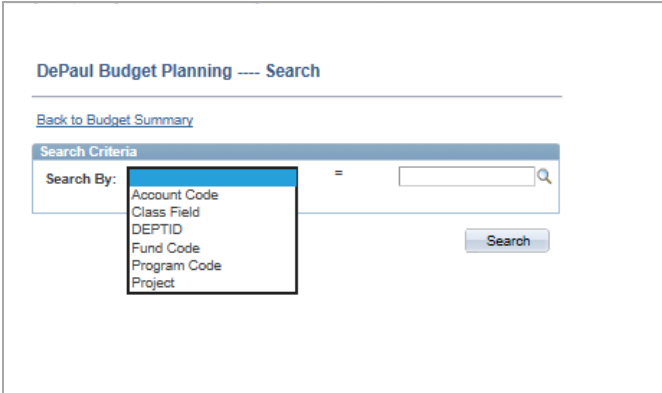
3. Select “All” from the fund code filter drop-down list

The list of DEPTIDs will be set back to show the budget manager’s list of DEPTIDs for all fund codes within the operating budget.

8. SEARCH

1. Navigate to the Budget Summary or Budget Detail page
2. Click the ‘Search’ link

A page like the following will be displayed:



DePaul Budget Planning --- Search

[Back to Budget Summary](#)

Search Criteria

Search By: =

- Account Code
- Class Field
- DEPTID
- Fund Code
- Program Code
- Project

3. Enter your search criteria (e.g. Account Code = 553180)
4. Click ‘Search’

The Budget Detail (Data Entry) page will be displayed listing matches for all of the DEPTIDs that you have the authority to view/edit.

9. SWITCH FROM “TAB VIEW” TO “SHOW ALL COLUMNS VIEW”

1. Navigate to the Budget Summary page
2. Click the button to switch from “Tab View” to “Show All Columns View”

All of the columns in each and every tab from the “Tab View” will now be displayed.

3. Click the button to switch from “Show All Columns View” back to the “Tab View”

Separate tabs are provided for “16/17 Original”, “16/17 Base”, “16/17 Final”, “16/17 Actual”, “17/18 Original”, “17/18 Base”, “17/18 Final”, and “18/19 Proposed”.

DePaul Budget Planning ---- Budget Summary [Search](#) [FAQ](#)

This page provides a summary by DEPTID. To enter proposed budget amounts, click on a DEPTID to display the Budget Detail page.

Fund

Personalize | Find | View All | First 1 of 1 Last

16/17 Base	16/17 Final	16/17 Actual	17/18 Base	17/18 Final	18/19 Proposed	18/19 Proposed	18/19 Proposed	18/19 Proposed	Comments	Done	All Comments
Fund Code	DEPTID	DEPTID Description	Budget Manager	18/19 Proposed Revenue	18/19 Proposed Financial Aid	18/19 Proposed Expenses	18/19 Proposed Net				
100	108100	Instl. Diversity & Equity	Perales, Jose			\$730,465.00	\$730,465.00				Test comment.(EORTIZ4,08-15-2017 03.23.40)

Budget Summary Totals:

	16/17 Original	16/17 Base	16/17 Final	16/17 Actual	17/18 Original	17/18 Base	17/18 Final	18/19 Proposed
Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Financial Aid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Net Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Salaries & Benefits	\$536,701.19	\$570,212.79	\$561,445.99	\$616,815.81	\$724,662.10	\$724,662.10	\$724,662.10	\$723,165.00
Departmental Expenses	\$7,324.00	\$7,324.00	\$7,324.00	\$653.85	\$7,324.00	\$7,324.00	\$7,324.00	\$7,300.00
Non-Departmental Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Expenses	\$544,025.19	\$577,536.79	\$568,769.99	\$617,469.66	\$731,986.10	\$731,986.10	\$731,986.10	\$730,465.00
Net Total	\$544,025.19	\$577,536.79	\$568,769.99	\$617,469.66	\$731,986.10	\$731,986.10	\$731,986.10	\$730,465.00

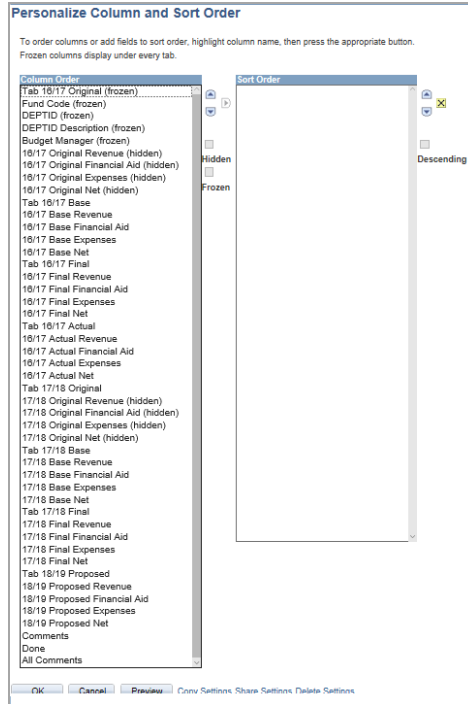
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- Phone: 312.362.6321 • E-mail: controller@depaul.edu • Web Site: <http://financialaffairs.depaul.edu>

10. CUSTOMIZE BUDGET SUMMARY PAGE

1. Navigate to the Budget Summary page
2. Click the 'Personalize' link

A page like the following will be displayed:



3. Hold down the Ctrl key and highlight any columns that you would like to hide on the Budget Summary page
4. Check the 'Hidden' checkbox
5. Click 'OK' to save changes

The Budget Planning Summary Page will now be displayed with your customized settings.

11. CUSTOMIZE BUDGET DETAIL PAGE

1. Navigate to the Budget Detail page
2. Click the 'Personalize' link
The Personalize page will be displayed.
3. Hold down the Ctrl key and highlight any columns that you would like to hide on the Budget Detail page
4. Check the 'Hidden' checkbox
5. Click 'OK' to save changes

The Budget Planning Detail Page will now be displayed with your customized settings.

Need help? Contact Budgets & Operational Reporting at:

• Phone: 312.362.6321 • E-mail: controller@depaul.edu • Web Site: <http://financialaffairs.depaul.edu>

12. DOWNLOAD BUDGET SUMMARY (DEPTID-LEVEL) DATA IN EXCEL FORMAT

1. Navigate to the Budget Summary page
2. Click the 'Download to Excel' button

All (DEPTID-level) Budget Summary data will be extracted to an Excel file.

13. DOWNLOAD BUDGET DETAIL (ACCOUNT-LEVEL) DATA IN EXCEL FORMAT

1. Navigate to the Budget Detail page
2. Click the 'Download to Excel' button

All (Account-level) Budget Detail data will be extracted to an Excel file.

14. BUDGETING CARRY-FORWARD AMOUNTS

1. Navigate to the Budget Summary page
2. Select a DEPTID that has a carry-forward available balance (i.e. fund 200, 220, 230, 240)

The Budget Detail page will be displayed. If the DEPTID has a carry-forward available balance, it will be shown with 'N/A' as the account code, and 'Carry-forward as of <DATE>' as the account description.

3. Enter a proposed budget amount for one of the following accounts within the DEPTID for Fund 200's only:
 - 416252 - Scholarships CF
 - 501922 - FT Salaries CF
 - 531922 - PT Salaries CF
 - 542112 - Benefits CF
 - 555252 - Dept Expense CF

If the desired account is not shown, use the add account feature to create it.

4. Enter a comment to indicate the amount of the carry-forward available balance that is being budgeted

Note – Be sure to coordinate with your executive area liaison when budgeting carry-forward amounts.

15. COMPLETING DATA ENTRY

1. Navigate to the Budget Detail page
2. Enter budget amounts for accounts in the '18/19 Proposed' column, then click Save
3. Go back to the Budget Summary page, check the checkbox in the 'Done' column for the DEPTID completed in steps 1 and 2
4. Repeat steps 1-3 for each DEPTID

DePaul Budget Planning ---- Budget Summary [Search](#) [FAQ](#)

This page provides a summary by DEPTID. To enter proposed budget amounts, click on a DEPTID to display the Budget Detail page.

Fund

16/17 Base	16/17 Final	16/17 Actual	17/18 Base	17/18 Final	18/19 Proposed					
Fund Code	DEPTID	DEPTID Description	Budget Manager	18/19 Proposed Revenue	18/19 Proposed Financial Aid	18/19 Proposed Expenses	18/19 Proposed Net	Comments	Done	All Comments
100	108100	Instl. Diversity & Equity	Perales, Jose			\$730,465.00	\$730,465.00		<input checked="" type="checkbox"/>	Test comment.(EORT124,08-15-2017 03.23.40)

Budget Summary Totals:

	16/17 Original	16/17 Base	16/17 Final	16/17 Actual	17/18 Original	17/18 Base	17/18 Final	18/19 Proposed
Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Financial Aid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Net Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Salaries & Benefits	\$536,701.19	\$570,212.79	\$561,445.99	\$616,815.81	\$724,662.10	\$724,662.10	\$724,662.10	\$723,165.00
Departmental Expenses	\$7,324.00	\$7,324.00	\$7,324.00	\$653.86	\$7,324.00	\$7,324.00	\$7,324.00	\$7,300.00
Non-Departmental Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Expenses	\$544,025.19	\$577,536.79	\$568,769.99	\$617,469.66	\$731,986.10	\$731,986.10	\$731,986.10	\$730,465.00
Net Total	\$544,025.19	\$577,536.79	\$568,769.99	\$617,469.66	\$731,986.10	\$731,986.10	\$731,986.10	\$730,465.00

16. CONTACT INFORMATION

Executive Area Liaisons

<u>Executive Area</u>	<u>Liaison</u>	<u>E-mail</u>	<u>Extension</u>
Office of the President	Eric Nelson	enelson@depaul.edu	2-7140
Office of the Provost	Alyssa Kupka	akupka@depaul.edu	2-6585
Office of the EVP	Sherri Sidler	ssidler@depaul.edu	2-7150

Budgets & Operational Reporting

<u>Contacts</u>	<u>E-mail</u>	<u>Extension</u>
Main Line	controller@depaul.edu	2-6321
Maggie Ramirez	mramire9@depaul.edu	2-6641
Erin Brezinski	ebrezins@depaul.edu	2-8685

Need help? Contact Budgets & Operational Reporting at:

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