

MAYO CLINIC



Funding Budget Applications Quick Reference Guide

June 2018



Prepared for the Mayo Clinic
Enterprise Kahua Deployment

FUNDING APPLICATIONS

Cost Management in Kahua is managed across Expense and Funding applications, all of which ultimately constitute a project's budget, commitments and actuals. The Funding side of cost management includes budgeting activities. Each activity will be managed in a separate sub-application within Funding:

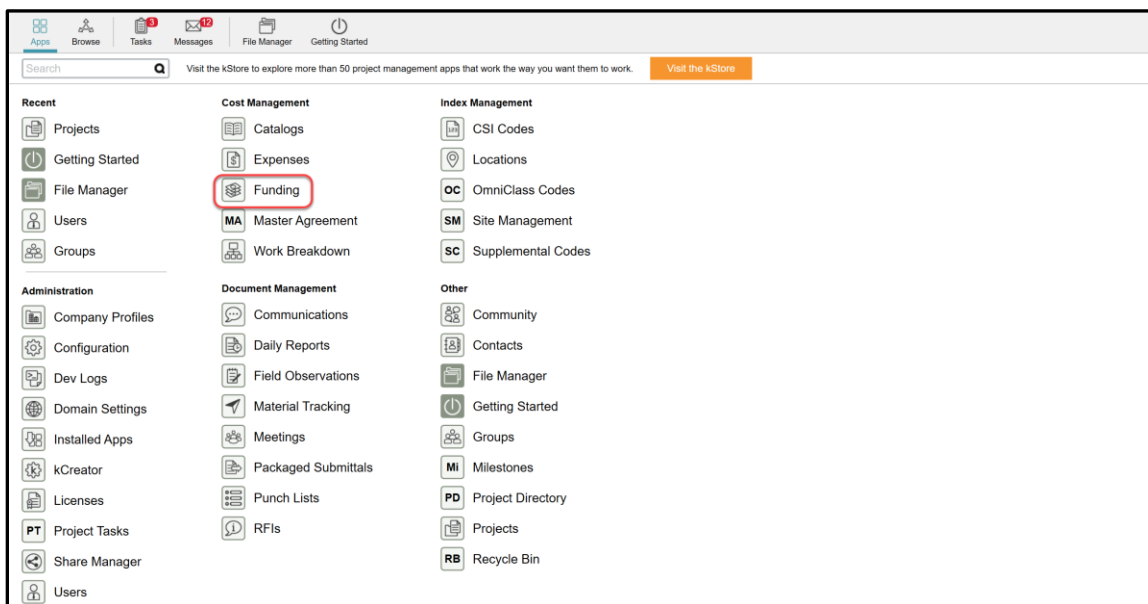
- Create a budget with the Budget application
- Manage any net-zero adjustments to the budget with the Budget Adjustments application
- Track supplemental funding with the Budget Changes application

Budgets allow project costs to be tracked on the Work Breakdown in corresponding Funding columns, which allow users to track budget against commitments and actual spend at a project or line item level.

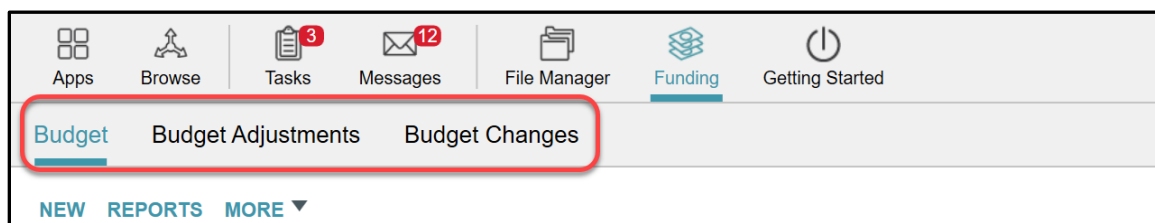
Note that users will have a Mayo template budget in the system when they copy the Project Template, so all initiated projects will have a blank budget with specific high-level account categories. If the user desires to budget at a more granular level or add additional codes, they may do so as they edit the budget record.

To navigate to the Funding Budget application:

1. Select the App Launcher.
2. Select the Funding application under the Cost Management section.



The three Funding apps display as sub-applications under the Apps Bar when Funding is open.

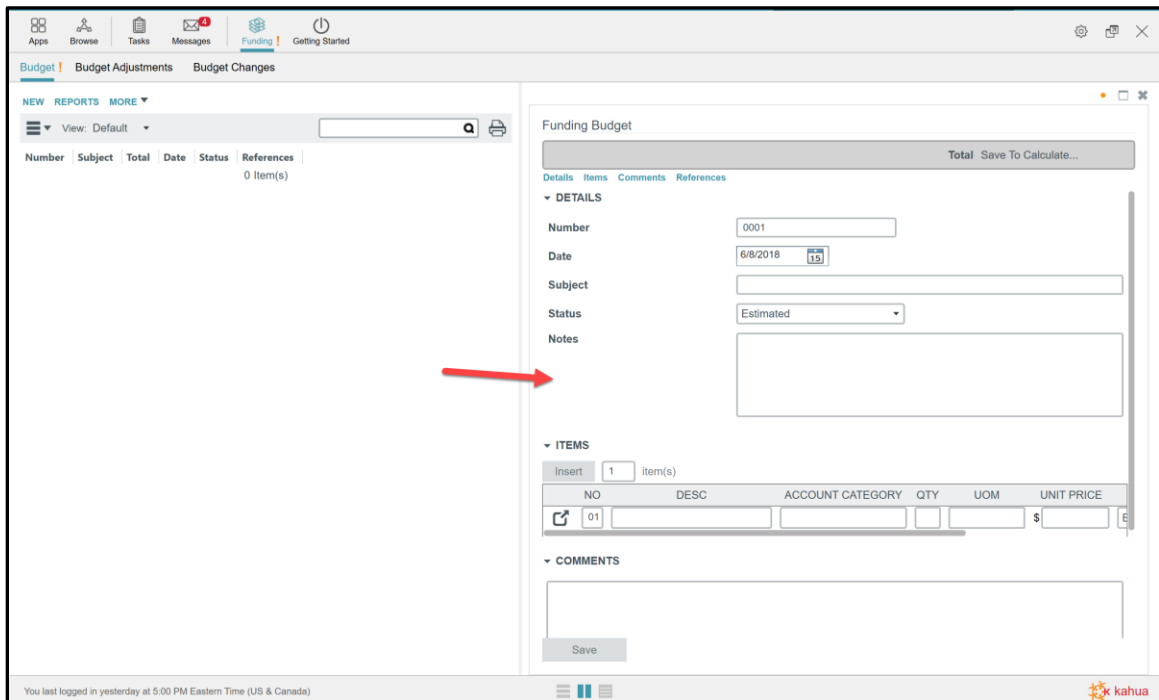
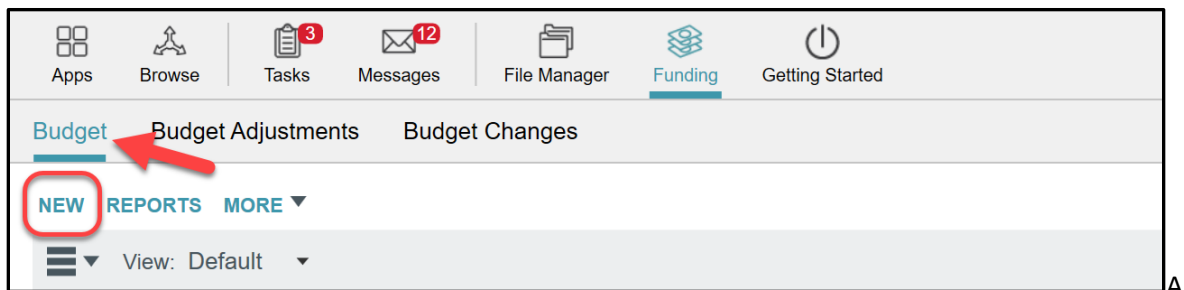


CREATING A BUDGET

The Budget application allows the user to create one or more budgets for a project. Each budget can be assigned one of four statuses, which will determine how items are displayed in the Work Breakdown. Users will have a Budget record defaulted in their new project that can be used as a starting point. Users may create additional budgets if desired, but all budgets will appear on the Work Breakdown based upon status assigned.

To create a budget:

1. With the Funding app open, click **Budget** to open the sub app. Click **New**. If you already have a budget record defaulted in your project, click on the record to open it in the right Detail pane.



At the top of the Detail pane the shaded area is where the budget total is displayed. The amount is calculated and displayed in this area by clicking **Save** at the bottom of the window.

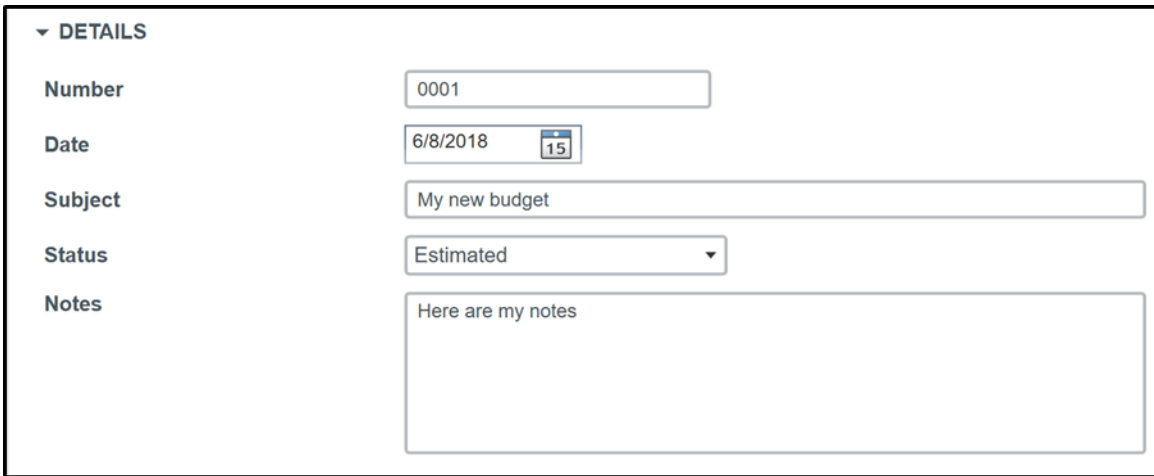


The screenshot shows the 'Funding Budget' window. At the top, there is a shaded area labeled 'Total' with the text 'Save To Calculate...' next to it. A red arrow points to the 'Total' button. Below this, there are tabs for 'Details', 'Items', 'Comments', and 'References'.

- Click Edit if this is for an existing budget record. The Detail pane will display editable fields. Fill out the DETAILS section as appropriate.

The Number field and the Date field may be defaulted, but are editable.

The Status field will display 'Estimated' while the budget is not yet approved. Users should not increment the status of the record until all line items have been entered.



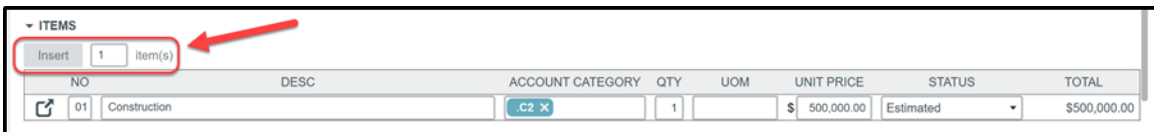
The screenshot shows the 'DETAILS' section of the Funding Budget window. It contains the following fields:

- Number:** 0001
- Date:** 6/8/2018
- Subject:** My new budget
- Status:** Estimated
- Notes:** Here are my notes

- Fill out the ITEMS section to enter important budget information. Each account category budgeted will require an additional line item.

For projects with existing budget templates, several line items will already exist. Each line item is editable. Templates have been created to budget at a high level – users may choose to add or remove line items in the budget.

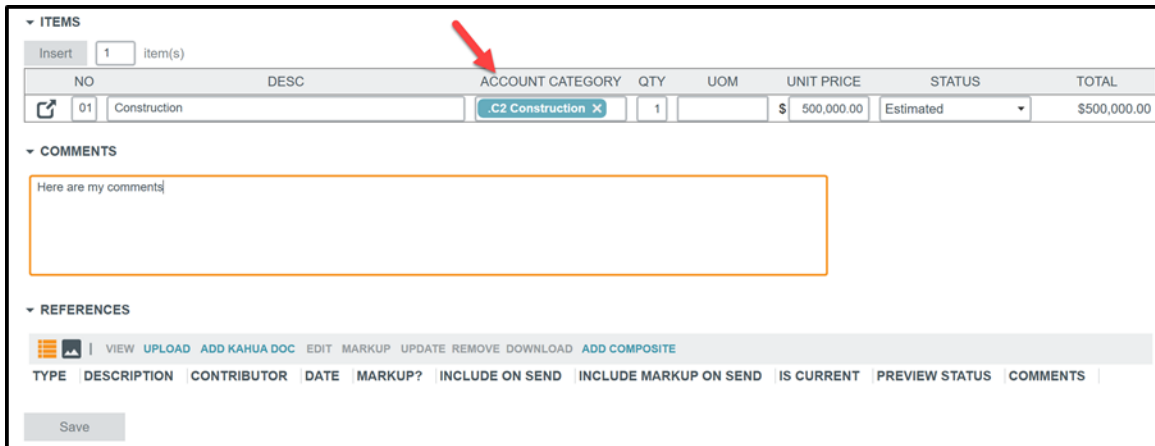
To add additional budget line items, enter the number of lines to be added in the box at the top of the ITEMS form, then click **Insert**. For example, to add two blank budget item lines, type 2 in the box and click **Insert**. Two blank line items will appear at the bottom of the ITEMS grid.



The screenshot shows the 'ITEMS' section of the Funding Budget window. At the top, there is a box with the text 'Insert 1 item(s)' and a red arrow pointing to it. Below this is a table with the following columns: NO, DESC, ACCOUNT CATEGORY, QTY, UOM, UNIT PRICE, STATUS, and TOTAL.

NO	DESC	ACCOUNT CATEGORY	QTY	UOM	UNIT PRICE	STATUS	TOTAL
01	Construction	C2	1		\$ 500,000.00	Estimated	\$500,000.00

- Each line item in the budget represents an Account Category.



The screenshot shows a web application interface for budgeting. At the top, there's a section labeled 'ITEMS' with an 'Insert' button and a count of '1' item(s). Below this is a table with columns: NO, DESC, ACCOUNT CATEGORY, QTY, UOM, UNIT PRICE, STATUS, and TOTAL. The first row shows '01' in the NO column, 'Construction' in the DESC column, '.C2 Construction X' in the ACCOUNT CATEGORY column (highlighted with a red arrow), '1' in the QTY column, an empty UOM column, '\$ 500,000.00' in the UNIT PRICE column, 'Estimated' in the STATUS column, and '\$500,000.00' in the TOTAL column. Below the table is a 'COMMENTS' section with a text area containing 'Here are my comments'. At the bottom is a 'REFERENCES' section with a toolbar containing buttons like VIEW, UPLOAD, ADD KAHUA DOC, EDIT, MARKUP, UPDATE, REMOVE, DOWNLOAD, and ADD COMPOSITE. Below the toolbar is a table with columns: TYPE, DESCRIPTION, CONTRIBUTOR, DATE, MARKUP?, INCLUDE ON SEND, INCLUDE MARKUP ON SEND, IS CURRENT, PREVIEW STATUS, and COMMENTS. A 'Save' button is at the bottom left.

Fill in the Account Category field first using one of two ways:

Click in the field – a list will pop up with the available Account Categories. Scroll through the list then click on the category to insert in the field. These codes refer to the hierarchical structure that is in the Work Breakdown application. It may be useful to open the Work Breakdown application to review the code structure if not already familiar with it.

Type in the field – begin typing the description of a category to filter the list of account categories by the description typed in. For example, type **plumb** in the field and several categories for plumbing appear. Click on the correct account category to insert it in the field.

Note: When a category is entered in the Account Category field, the Description field auto populates. Users may choose to leave the description, or enter a new description to denote specific detail of the budgeted line item.

- To enter budget values for a line item, fill out at the QTY (quantity) and UNIT PRICE fields. For example, to assign a value of \$10,000 to a line item, type a 1 in QTY and \$10,000 in UNIT PRICE. To calculate the total, users must enter a QTY for each line item with value assigned.

To enter additional information, use the QTY, UOM (unit of measure), and UNIT PRICE fields. For example, to budget for 100 days of labor at \$1,000/day, put “100” in QTY, put “day” in UOM, and put “\$1,000” in UNIT Price. This displays \$100,000 in the TOTAL column upon clicking Save.

- STATUS for each line item defaults to Estimated, in line with the record status in the DETAILS section. Leave this default in place in each budget line item. The overall budget status will be incremented at the document/record level in the Details section that is above the Item grid. When the document/record level Status is updated, all line items will also increment to that status, to avoid users having to increment status for each individual line item.
- Fill out the Comments section if desired.

8. In the References section, add any necessary documents from your computer by selecting **Upload** or from your Kahua File Manager by selecting **Add Kahua Doc**.
9. Click **Save**. The budget record will Save – if a new budget record was created above, the new record will appear in the log view on the left side of the screen. Click on the saved record.

The screenshot displays the 'Budget' application window. On the left, a sidebar shows a list of budget records with columns for 'Number', 'Subject', and 'Total'. The record '0001 My new budget \$500,000.00' is selected. The main area shows the details for this record, including a 'Total \$500,000.00' at the top. Below this, there are sections for 'DETAILS', 'ITEMS', 'COMMENTS', and 'REFERENCES'. The 'ITEMS' section contains a table with columns: NO, DESC, ACCOUNT CATEGORY, QTY, UOM, UNIT PRICE, STATUS, and TOTAL. The table has one row: '01 Construction .C2 Construction 1 \$500,000.00 Estimated \$500,000.00'. The 'COMMENTS' section shows a comment by 'Yann Bouzerand - Mayo Enterprise - 6/8/2018 11:08 AM' with the text 'Here are my comments'. The 'REFERENCES' section is currently empty.

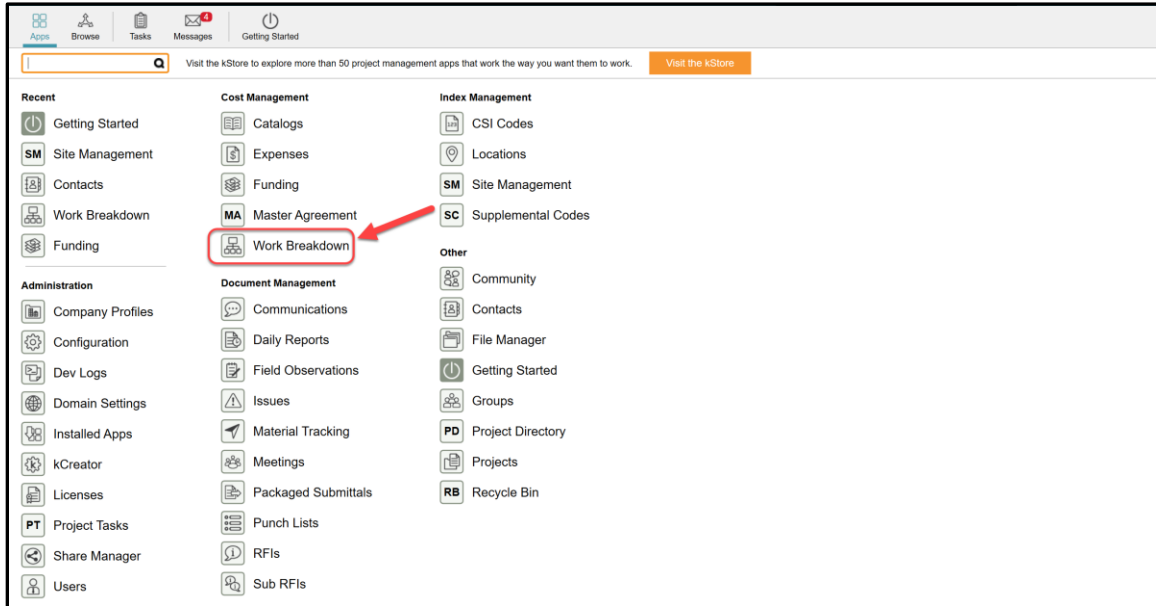
NO	DESC	ACCOUNT CATEGORY	QTY	UOM	UNIT PRICE	STATUS	TOTAL
01	Construction	.C2 Construction	1		\$500,000.00	Estimated	\$500,000.00

The Total appears now at the top of the window – if the total is not accurate, check that all line items have a QTY listed. Without a QTY, they will not be counted towards the Total.

STATUS IN THE WORK BREAKDOWN APP

Once a budget is created with an *Estimated* status, the budgeted values will be displayed in the Work Breakdown app.

1. Click the App Launcher and select the Work Breakdown app under the Cost Management section.



2. Note that any estimated budget items appear in the Estimated Budget column.

GENERAL		BUDGET				
Code	Description	Estimated Budget	Approved Budget	Budget Adjustments	Approved Changes	Current Budget
▶ .	PROJECT TOTAL	\$500,000.00				\$0.00

3. The Work Breakdown has a drill down feature allowing the user to see more detail at the account category level or at summary levels throughout the hierarchal codes.
4. Select the right arrow ▶ in the Code column to drill down into the account category codes.

GENERAL		BUDGET				
Code	Description	Estimated Budget	Approved Budget	Budget Adjustments	Approved Changes	Current Budget
▶ .	PROJECT TOTAL	\$500,000.00				\$0.00

With the details displayed, the user can see that the information is the same as the data entered the budget. This gives users both project level, summary and granular view into account category budget.

GENERAL		BUDGET				
Code	Description	Estimated Budget	Approved Budget	Budget Adjustments	Approved Changes	Current Budget
▲ .	PROJECT TOTAL	\$500,000.00				\$0.00
▲ .C	CAPITAL	\$500,000.00				\$0.00
▶ .C1	Professional Fees					\$0.00
▲ .C2	Construction	\$500,000.00				\$0.00
▶ .C21	General Construction					\$0.00
▶ .C22	Mechanical Construction					\$0.00
▶ .C23	Electrical Construction					\$0.00
▶ .C24	Other Construction					\$0.00
▶ .C25	Owner Provided Construction					\$0.00
▶ .C3	FFE					\$0.00
▶ .C4	Contingency					\$0.00
▶ .E	EXPENSE					\$0.00
.P	POTENTIAL CHARGE					\$0.00
.S	STUDIES					\$0.00

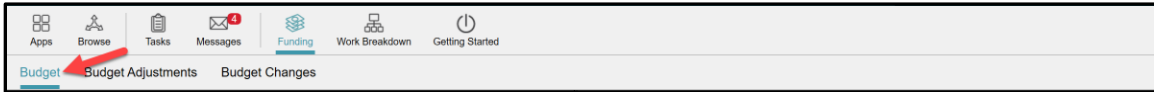
Per above, we see \$500,000 budgeted for Construction. It is in the Estimated column, meaning the record and the line item in the Budget record are in 'Estimated' status. The Work Breakdown information in the image above might look like this in the Budget app:

ITEMS								
	NO	DESC	ACCOUNT CATEGORY	QTY	UOM	UNIT PRICE	STATUS	TOTAL
🔗	01	Construction	.C2 Construction	1		\$500,000.00	Estimated	\$500,000.00

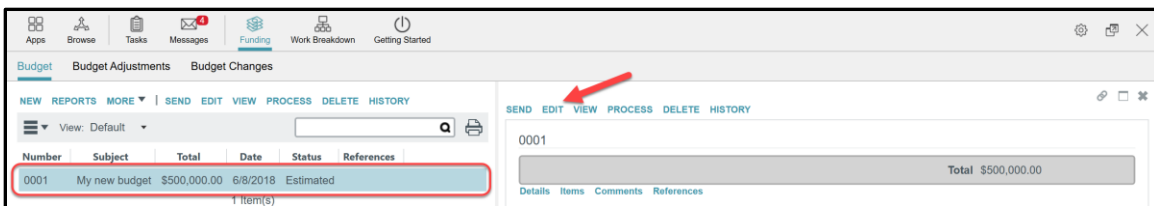
APPROVING A BUDGET

Once the estimated budget is ready to be incremented to Approved, the status must be changed to make the approved budget appear in the approved budget column in the Work Breakdown.

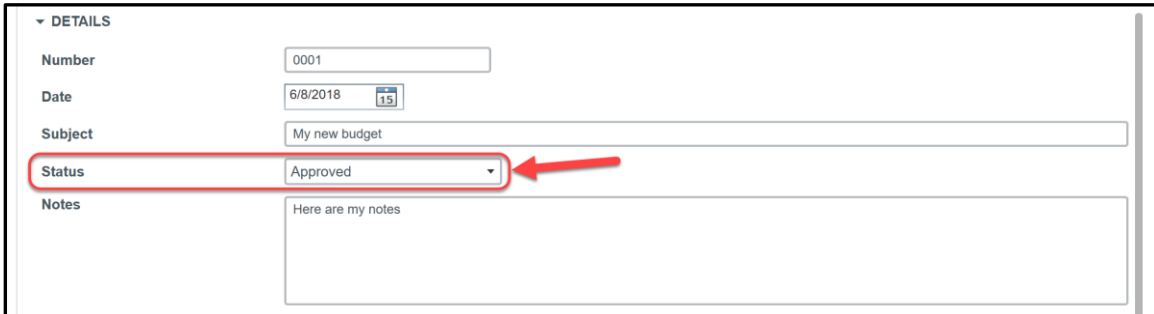
1. Select the Funding app then the Budget sub app.



2. Select the budget record to edit. Once the record is selected, click Edit. The budget opens in the Detail pane.



3. In the Details Section of the budget, select the appropriate status from the drop-down menu, then click **Save**. Notice that on the saved record, all line items now appear with a status of Approved. The line item status is what drives each line item to the appropriate column in Work Breakdown.



In the Work Breakdown, the budget is now in the Approved Budget column (1). Notice that it appears is in the Current Budget column (2) as well.

The Current Budget is a sum of Approved Budget + Budget Adjustments + Budget Changes. In the below sections, Budget Adjustments and Budget Changes will be described.

Note that the values in the Estimated Budget column will have moved, and the Estimated Budget column will be empty when the budget is incremented to Approved.

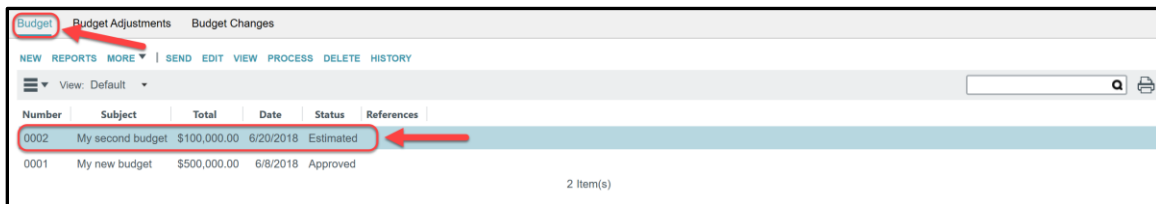
GENERAL		BUDGET				
Code	Description	Estimated Budget	Approved Budget	Budget Adjustments	Approved Changes	Current Budget
▲ .	PROJECT TOTAL		\$500,000.00			\$500,000.00
▲ .C	CAPITAL		\$500,000.00			\$500,000.00
▶ .C1	Professional Fees		1			2 \$0.00
▲ .C2	Construction		\$500,000.00			\$500,000.00
▶ .C21	General Construction					\$0.00
▶ .C22	Mechanical Construction					\$0.00
▶ .C23	Electrical Construction					\$0.00
▶ .C24	Other Construction					\$0.00
▶ .C25	Owner Provided Construction					\$0.00
▶ .C3	FFE					\$0.00
▶ .C4	Contingency					\$0.00
▶ .E	EXPENSE					\$0.00

COPYING A BUDGET

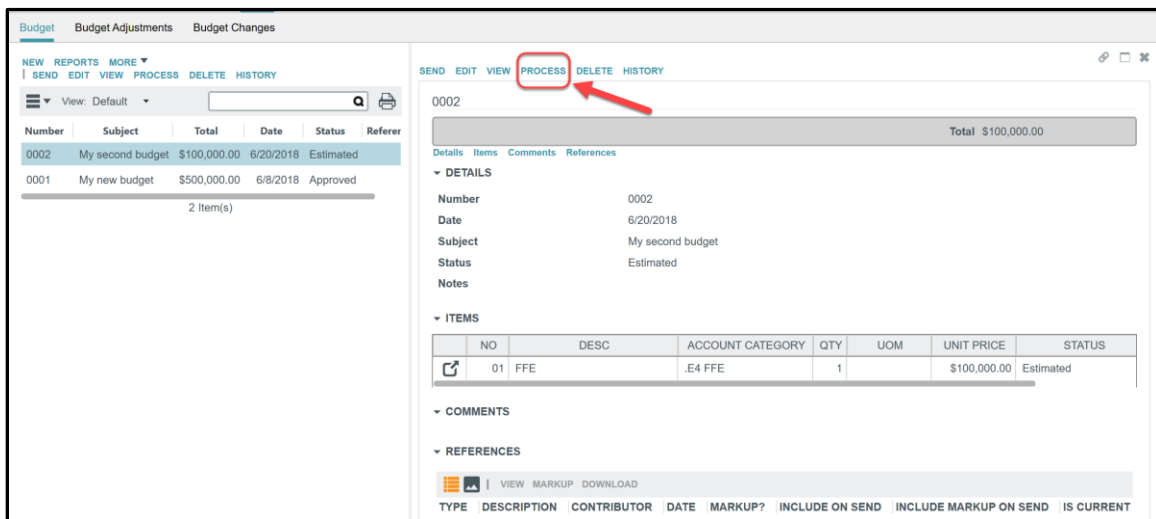
Users may copy a budget to maintain information on a previous budget (maybe an estimated budget). For instance, it may be useful to copy a budget if users want to maintain previous copies of an estimated budget. When a budget is copied, the status of the initiating budget will increment to 'Superseded' and thus not appear on the Work Breakdown. The new budget can be adjusted, edited and incremented to appropriate status as needed.

To copy a budget:

1. Navigate to the Budget application and select the record that will be copied.



2. In the Detail pane, select **Process**.



The Process window appears. The Source will detail the Budget record chosen to copy, and the Target application details should be greyed out.

Process

Select target partition and document type:

Source: My second budget

Target Application: Funding Budget

Select copies to include in references:

- ☒ PDF of Initiating document (current state) on the Destination document
- ☒ PDF of Destination document (current state) on the Initiating document

Select references to include:

Type	Description	Reference Type
<input checked="" type="checkbox"/> Supporting Document	Budget.pdf	Supporting Document

Cancel Start Processing

3. PDF versions of the budgets can be created and attached to the initiating and new budget as references. By default, both PDF documents are selected in the “Select copies to include in references” section of the form.
4. References from the initiating budget are listed under the **Select references to include** heading. Users may choose to check boxes next to any reference documents that should be carried forward into the new budget.
5. Select **Start Processing** to copy the budget. The following will then occur:
 - a. A copy of the budget will be created and appear in the log with a status of Estimated.
 - b. The status of the initiating budget (the source for the copy) will have a status of Superseded and it will not appear in the Work Breakdown.
 - c. The new budget may be edited, and the status may be incremented as desired. Recall that the line item edits should all be made before adjusting the status in the DETAILS section.

Budget					
Budget Adjustments					
Budget Changes					
NEW REPORTS MORE ▾ SEND EDIT VIEW PROCESS DELETE HISTORY					
View: Default ▾					
Number	Subject	Total	Date	Status	References
0003	My second budget	\$100,000.00	6/20/2018	Estimated	□
0002	My second budget	\$100,000.00	6/20/2018	Superseded	□

BUDGET ADJUSTMENT APP

The Budget Adjustment app tracks net-zero changes against the project budget. Budget adjustments can arise when money is reallocated from one account category code to another, or when money is pulled from Contingency. All adjustments against a budget will be tracked in the Budget Adjustments application rather than editing the Approved budget directly. This allows for granular reporting and insight into where budget adjustments were required throughout the project.

Click **Budget Adjustments** from the Action bar in the Funding app to begin.



1. Click **New**. The Budget Adjustment form will display in the Detail pane.

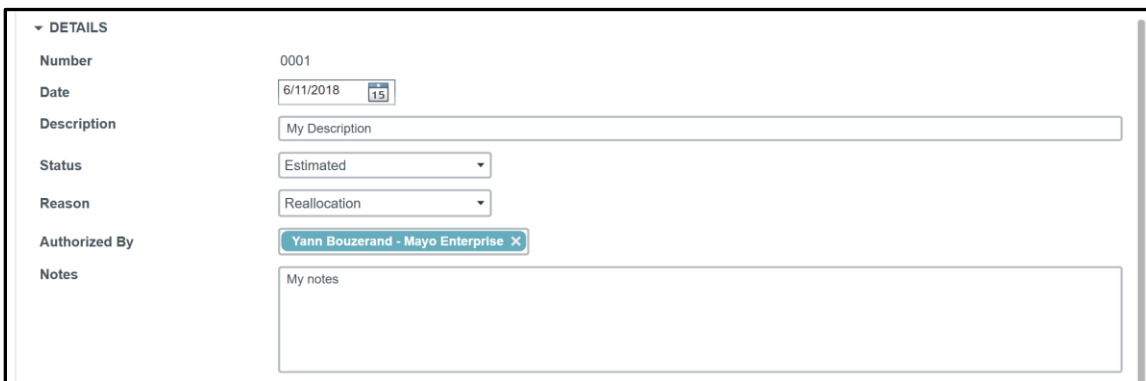
The screenshot shows the Budget Adjustment form in the Detail pane. The 'NEW' button is highlighted with a red box, and a red arrow points to it from the left. The form includes a header with '0001 My Description' and a 'Total Save To Calculate...' button. Below the header, there are tabs for 'Details', 'Items', 'Comments', and 'References'. The 'Details' tab is active, showing fields for Number, Date, Description, Status, Reason, Authorized By, and Notes. The 'Items' tab is also visible, showing a table with columns for NO, DESC, ACCOUNT CATEGORY, QTY, UOM, and UNIT PRICE. The table contains two rows of data.

NO	DESC	ACCOUNT CATEGORY	QTY	UOM	UNIT PRICE
01	My description	C2 Construction	1		\$ -50,000.00
02	My description	C3 FFE	1		\$ 50,000.00

The Total in the summary header of the record will not appear until the record has been populated and saved, similar to the Budget application summary header.

The screenshot shows the summary header of the Budget Adjustment form. It includes the text '0001 My Description' and a 'Total Save To Calculate...' button. The button is highlighted with a red box, and a red arrow points to it from the left.

- Fill out the **DETAILS** section of the Budget Adjustment form. See below description of each field:



DETAILS

Number: 0001

Date: 6/11/2018

Description: My Description

Status: Estimated

Reason: Reallocation

Authorized By: Yann Bouzerand - Mayo Enterprise

Notes: My notes

Number- will be auto populated/incremented when a new record is created

Date – will be auto populated with the current date upon creation of the record

Description – will display a short description of the adjustment transaction

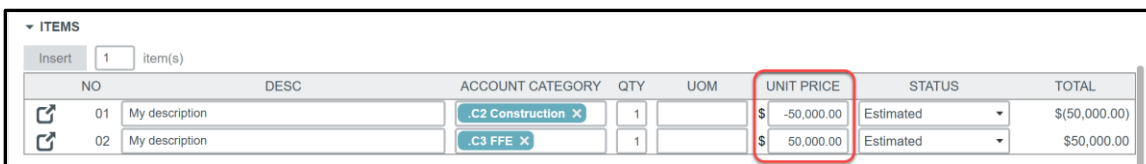
Status – determines the column in the Work Breakdown where the dollars will appear. The status should be incremented to Approved when the adjustment is formally applied to the project, to have the adjustment reflected in the total Current Budget for an account category code.

Reason – use *Reallocation* if dollars will be reallocated to another account category or enter *Other*. If users enter *Other*, detail of the Reason should be entered in the 'Notes' field.

Authorized By – will be auto populated with the current user's name. Users can edit this by selecting the 'x' to the right of the name and populating the field with another Contact's name. Start typing the name to search for it or click in the field to display a drop down of all the domain's contacts.

Notes – enter notes as needed.

- Fill out the Items grid.



NO	DESC	ACCOUNT CATEGORY	QTY	UOM	UNIT PRICE	STATUS	TOTAL
01	My description	C2 Construction	1		\$ -50,000.00	Estimated	\$(50,000.00)
02	My description	C3 FFE	1		\$ 50,000.00	Estimated	\$50,000.00

The Items grid is defaulted with 2 line items. A budget adjustment must have a minimum of 2 line items, as the total must equal 0. Additional line items may be inserted as needed by using the 'Insert' button above the Items grid.

The Description, Account Category, QTY and Unit Price fields are required. Use negative numbers in the Unit Price field to remove budget from an Account Category and positive numbers to allocate funds to a different Account Category. After all adjustments have been entered, the total of all

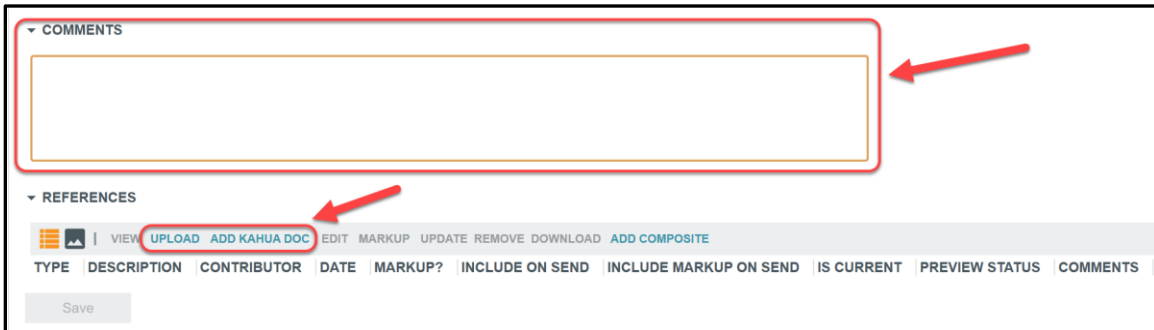
entries in the Items grid must equal \$0. Users will receive an error message upon Save if the total does not equal 0, or if required components in the grid are missing.

Note: The Status should be left as Estimated for the moment. It will be modified in the Details section above the Items section once all the information is entered and before saving.



The screenshot shows the 'DETAILS' section of a web application. It contains several input fields: 'Number' (0001), 'Date' (6/11/2018), 'Description' (My Description), and 'Status' (Estimated). The 'Status' dropdown menu is highlighted with a red box, and a red arrow points to it.

4. The Comment field is optional but is the appropriate field to enter a comment on this transaction for reference in the future.
5. In the **REFERENCES** section, add any documents from your computer by selecting **UPLOAD** or from your Kahua File Manager application by selecting **ADD KAHUA DOC**.



The screenshot shows the 'COMMENTS' and 'REFERENCES' sections. The 'COMMENTS' section has a large text area highlighted with a red box and a red arrow. The 'REFERENCES' section has a toolbar with buttons: 'VIEW', 'UPLOAD', 'ADD KAHUA DOC', 'EDIT', 'MARKUP', 'UPDATE', 'REMOVE', 'DOWNLOAD', and 'ADD COMPOSITE'. The 'ADD KAHUA DOC' button is highlighted with a red box and a red arrow. Below the toolbar is a table with columns: 'TYPE', 'DESCRIPTION', 'CONTRIBUTOR', 'DATE', 'MARKUP?', 'INCLUDE ON SEND', 'INCLUDE MARKUP ON SEND', 'IS CURRENT', 'PREVIEW STATUS', and 'COMMENTS'. A 'Save' button is at the bottom left.

6. Go back to the Detail section upon completion and change the Status field into *Approved* if the record should appear as approved on the Work Breakdown.
7. Notice that the status of the Line Items in the Status column change to Approved as well.
8. Select **SAVE**.

DETAILS

Number

0001

Date

6/11/2018

13

Description

My Description

Status

Approved

Reason

Reallocation

Authorized By

Yann Bouzerand

Notes

My notes

ITEMS

Insert

1

Item(s)

NO	DESC	ACCOUNT CATEGORY	QTY	UOM	UNIT PRICE	STATUS	TOTAL
01	My description	C2	1		\$ -50,000.00	Approved	\$(50,000.00)
02	My description	C3	1		\$ 50,000.00	Approved	\$50,000.00

COMMENTS

Save

In the log, the record appears with a total of \$0.00 and with an *Approved* status. The record will appear in the Work Breakdown in the 'Budget Adjustments' column.

Budget Budget Adjustments Budget Changes						
NEW REPORTS MORE SEND EDIT VIEW DELETE HISTORY						
View: Default						
Number	Description	Total	Date	Status	References	
0001	My Description	\$0.00	6/11/2018	Approved		

1 Item(s)

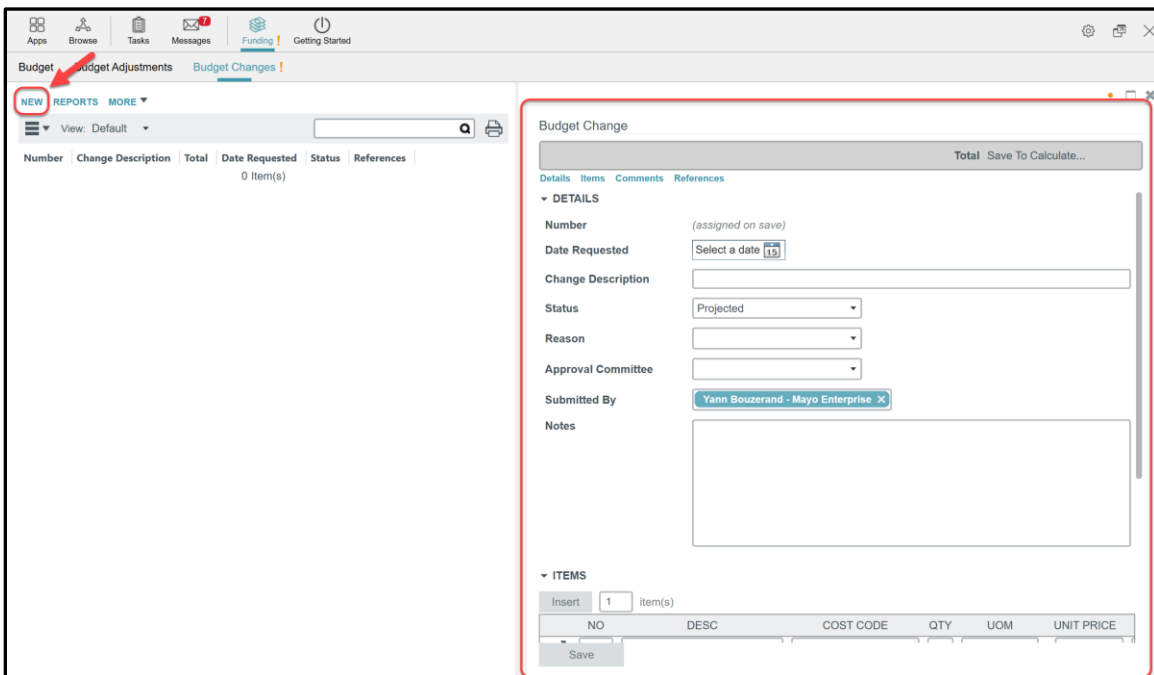
BUDGET CHANGES APP

The Budget Changes app allows project teams to initiate changes to the Project's approved budget, which may be a net increase or a decrease in budget. This differs from the Budget Adjustment application, which requires the changes to be net-zero transactions.

Click **Budget Changes** from the Action bar in the Funding app to begin.



1. Select **New** to initiate a new budget change. A Budget Change record appears in the Detail pane.



Recall that the summary header Total will not be calculated until after clicking Save.



2. Fill out the Details section of the form.

The screenshot shows a form titled 'DETAILS' with the following fields:

- Number**: (assigned on save)
- Date Requested**: 6/20/2018 (with a calendar icon)
- Change Description**: Construction budget change
- Status**: Projected (dropdown menu)
- Reason**: Scope Change (dropdown menu)
- Approval Committee**: Florida Executive Operations (dropdown menu)
- Submitted By**: Yann Bouzerand - Mayo Enterprise (with a close button)
- Notes**: here are my notes (text area)

Number - will be assigned upon save; will increment by 1

Date Requested – will allow the user to choose a date for the budget change

Change Description – will allow the user to describe the budget change

Status – will determine where in the Work Breakdown column the dollars will appear

Reason - will allow the user to choose between *Scope Change* and *Other*

Approval Committee – will display all the Mayo Clinic committees in a drop-down list; users should select the committee that approved the supplemental funding

The screenshot shows the 'Budget Change' form with the 'Approval Committee' dropdown menu open. The menu lists the following options:

- Board of Governors
- Board of Trustees
- Charter House Board of Directors
- Department/Division
- Florida Executive Operations Team (highlighted)
- Florida-Facilities Planning Committee (FPC)
- Franciscan Healthcare Board
- Mayo Clinic Administrative Team (MCAT)
- Mayo Clinic Clinical Practice Committee (MC-CPC)
- Mayo Clinic Education Committee
- Mayo Clinic Management Team (MT)
- Mayo Clinic Research Committee
- Mayo Clinic Research Space & Equipment Subcommittee

Submitted by – will be auto populated by the name of the user who initiated the budget change

Notes – allows the user to add notes to the record

3. Fill out the **ITEMS** section

The Items grid is defaulted to have 1 line upon initiation of a budget change. More lines may be inserted as needed.

The Description, Account Category, QTY and Unit Price fields are required in each line item.

Note: The Status will not be incremented in the items grid. It will be modified in the Details section above the Items section once all the information is entered.

4. The Comment field is optional, but it is good practice to enter a comment on this transaction for future reference.

5. In the REFERENCES section, add documents from the computer by selecting **UPLOAD** or from the Kahua File Manager application by selecting **ADD KAHUA DOC**.

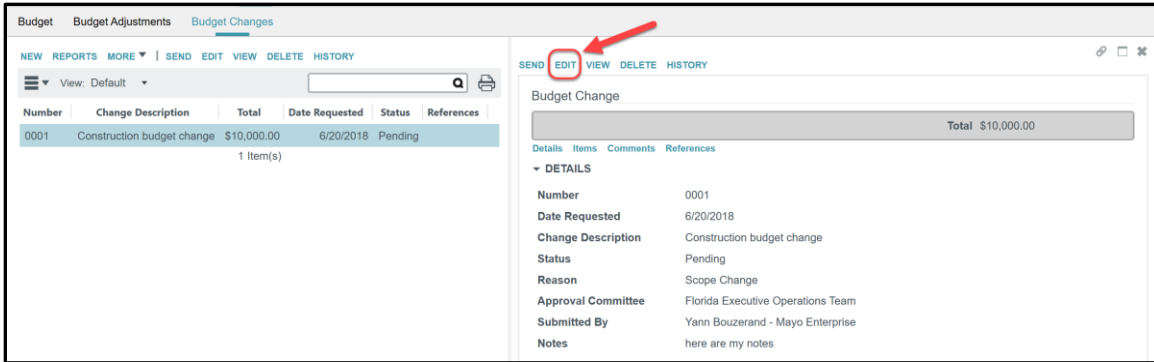
6. If the budget change has not been approved yet, the user can save the record under the *Pending* status.

Note that a Budget Change with a *Projected* or *Pending* status will not be displayed in the Work Breakdown.

The record in the log displays the dollars amount and the *Pending* status of the budget change.

Number	Change Description	Total	Date Requested	Status	References
0001	Construction budget change	\$10,000.00	6/20/2018	Pending	

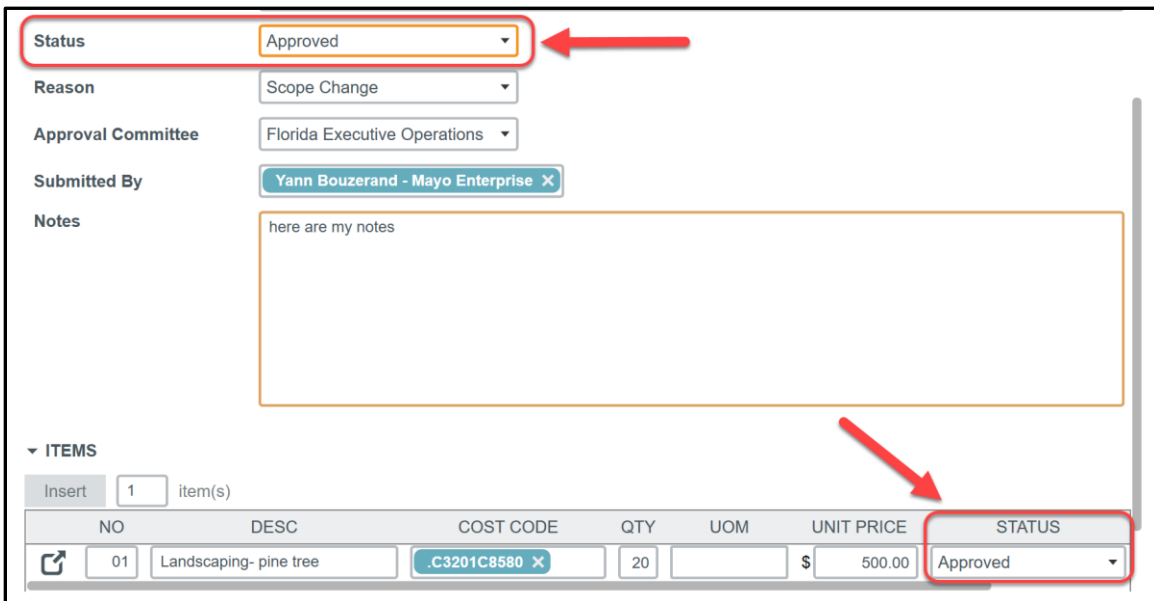
7. Once the budget change is approved, select the record and click on **EDIT**.



The screenshot shows the 'Budget Changes' interface. On the left, there is a table with columns: Number, Change Description, Total, Date Requested, Status, and References. The first row shows '0001 Construction budget change \$10,000.00 6/20/2018 Pending'. On the right, the 'DETAILS' section for item 0001 is expanded, showing fields for Date Requested, Change Description, Status, Reason, Approval Committee, Submitted By, and Notes. A red arrow points to the 'EDIT' button in the top navigation bar.

8. In the DETAILS section, change the status to *Approved*.

Note that the status of the item(s) changed upon changing the status in the DETAILS section.



The screenshot shows the 'DETAILS' section of the budget change form. The 'Status' dropdown menu is set to 'Approved'. Below it, the 'Reason' is 'Scope Change', 'Approval Committee' is 'Florida Executive Operations', and 'Submitted By' is 'Yann Bouzerand - Mayo Enterprise'. The 'Notes' field contains the text 'here are my notes'. At the bottom, the 'ITEMS' section is expanded, showing a table with columns: NO, DESC, COST CODE, QTY, UOM, UNIT PRICE, and STATUS. The first row shows '01 Landscaping- pine tree C3201C8580 20 \$ 500.00 Approved'. A red arrow points to the 'Status' dropdown menu in the top section, and another red arrow points to the 'STATUS' column in the items table.

9. Select the **SAVE** button to change the status of the budget change.

BUDGET CHANGES IN THE WORK BREAKDOWN

Once the approved Budget Change is completed and successfully saved, check the Work Breakdown to see updated reflected there.



The Approved Changes column will show the amount approved in the Budget Changes application.

GENERAL		BUDGET				
Code	Description	Estimated Budget	Approved Budget	Budget Adjustments	Approved Changes	Current Budget
▶ .	PROJECT TOTAL		\$500,000.00	\$0.00	\$10,000.00	\$510,000.00

Note that in the Current Budget, the approved budget change amount of \$10,000.00 has been added to the original approved budget of \$500,000.00 for a Current Budget of \$510,000.00.

1. Drill down in the Work Breakdown to the specific account category to where the additions are.

GENERAL		BUDGET				
Code	Description	Estimated Budget	Approved Budget	Budget Adjustments	Approved Changes	Current Budget
▶ .	PROJECT TOTAL		\$500,000.00	\$0.00	\$10,000.00	\$510,000.00
▶ .C	CAPITAL		\$500,000.00	\$0.00	\$10,000.00	\$510,000.00
▶ .C1	Professional Fees					\$0.00
▶ .C2	Construction		\$500,000.00	\$(50,000.00)		\$450,000.00
▶ .C3	FFE			\$50,000.00	\$10,000.00	\$60,000.00
▶ .C31	Capital Furniture					\$0.00
▶ .C32	Capital Furnishings				\$10,000.00	\$10,000.00
▶ .C3201	Capital Furnishings				\$10,000.00	\$10,000.00
▶ .C3201C8540	Window Treatments					\$0.00
▶ .C3201C8560	Art					\$0.00
▶ .C3201C8570	Signage					\$0.00
▶ .C3201C8580	Plants				\$10,000.00	\$10,000.00
▶ .C33	Capital Equipment					\$0.00
▶ .C4	Contingency					\$0.00
▶ .E	EXPENSE					\$0.00
▶ .P	POTENTIAL CHARGE					\$0.00
▶ .S	STUDIES					\$0.00

Changes at the deepest item level are displayed in blue to indicate a hyperlink. Click on the hyperlink to display the detail of the value displayed, including what record(s) contributed to the value.

GENERAL		BUDGET				
Code	Description	Estimated Budget	Approved Budget	Budget Adjustments	Approved Changes	Current Budget
▲ .	PROJECT TOTAL		\$500,000.00	\$0.00	\$10,000.00	\$510,000.00
▲ .C	CAPITAL		\$500,000.00	\$0.00	\$10,000.00	\$510,000.00
▶ .C1	Professional Fees					\$0.00
▶ .C2	Construction		\$500,000.00	\$(50,000.00)		\$450,000.00
▲ .C3	FFE			\$50,000.00	\$10,000.00	\$60,000.00
▶ .C31	Capital Furniture					\$0.00
▲ .C32	Capital Furnishings				\$10,000.00	\$10,000.00
▲ .C3201	Capital Furnishings				\$10,000.00	\$10,000.00
.C3201C8540	Window Treatments					\$0.00
.C3201C8560	Art					\$0.00
.C3201C8570	Signage					\$0.00
.C3201C8580	Plants				\$10,000.00	\$10,000.00
▶ .C33	Capital Equipment					\$0.00
▶ .C4	Contingency					\$0.00
▶ .E	EXPENSE					\$0.00
.P	POTENTIAL CHARGE					\$0.00
.S	STUDIES					\$0.00

A window pops up and displays detail of the budget change, including the budget change number and the description entered when the budget change was created.

2. Select the highlighted text and it will bring the user to the budget change record.

Details

Approved Changes

FCCO: - 0001 Construction budget change
01 Landscaping- pine tree

\$10,000.00

\$10,000.00

\$10,000.00

Ok