BUDGET DEVELOPMENT

The Budget Development process allows you to enter or edit Budget Pools for each FOP after Salary Planner has been completed.

Budget Prep Authorization

Financial Manager Provides Authorization

Initial Access to Salary Planner and Budget Development is available through Team App by organization code. **Access will be limited to three individuals per Organization.**


The Financial Manager for each organization must register individuals (including themselves) via the TEAM Application (Team App). All financial manager levels have the authority to grant access to Budget Prep. You may view organization financial managers in the Cognos Finance report FI028 (sample below) Organization Hierarchy Report. **NOTE: See Budget Prep Reports in Team App to view current access.**

The Authorization site is through the Team Application. There are several ways to access the Team App site:

- [http://team.texastech.edu](http://team.texastech.edu)
- Team App link on the Raiderlink under A&F Work Tools Tab under AFISM.
- Budget Prep Menu

**Instructions for Budget Prep Authorization:**

The Organization Financial Manager logs on to [http://team.texastech.edu](http://team.texastech.edu) with eRaider ID and Password (not required if accessing through Raiderlink under A&F Work Tools Tab under AFISM.)

- Choose **Access Request** from the menu provided
- Select Application: click the **Budget Prep Security Request** link
- Enter the eRaider User ID for the **user you are requesting** permission for. Note: if you do not know the eRaider ID, you may click the **Search for eRaider ID** radio button; Click **Next**
From the **Select Organization Code** screen, click on selected Organization Code(s). Use the arrow keys to move the **Select Orgn Code** to the **Orgns Selected** column. You may also use this application to remove authorizations by moving organization codes from **Orgns Selected** to **Select Orgn Code**.

- Use the double arrows to move all Organizations listed.

**NOTE:** Organization selected allows authorization to all FOPs related to the selected Organization.

Click on **Submit**

- You will receive Confirmation showing a Summary of your request. From this point you may click on the radio button to **Submit Another Request**. Repeat the process to add additional Budget Prep users.
Budget Prep Reports

- Log on to [http://team.texastech.edu](http://team.texastech.edu)
- Enter your eRaider ID and Password (Note: not required if accessed through Raiderlink)
- Choose Reports from the menu
- Click on Budget Prep Reports
  - **List of Budget Prep Report Users** – Provides list by Organization code
    - Select a home department organization code from drop down list
    - Click Get Budget Prep Users radio button
  - **Budget Prep Access for Selected User** – Provides list by individual
    - Enter the eRaider ID for the user you are searching for, click Get Budget Prep Users radio button. Note: if you do not know the eRaider ID, you may click the Lookup eRaider radio button.
Is your FOP budgeted by FOP or FOAP?

To determine if your FOP is budgeted by FOP or FOAP, you may add the Available Budget tab in Raiderlink and view live budget availability. If budget pools are shown under Account in the data results it is budgeted by FOAP. If budget pools are not shown under Account in the data results it is budgeted by FOP.

Budget checking is determined based on the funding source (fund class). There are two methods for budget checking:

**FOP**  
Budget checking at the FOP allows you to spend the total available balance of all budget pools. Funds are not required in specific budget pools for spending with an Account code.

**FOAP**  
Budget checking at the FOAP allows you to spend the available balance in the budget pool. Funds need to be allocated through a Budget Revision in the specific budget pool for spending with Account codes within that budget pool.

Instructions for adding and using the Available Budget Tab, and Adding Channels and Tabs are located in Raiderlink > Finance Announcements > Available Budget Tab.

There is also a breakdown of fund classes and how they are budgeted located on the AFISM Crosswalk page under Fund, titled “Budget by FOP or FOAP”:

Access Budget Development

The Budget Prep Menu is accessed via the Raiderlink [http://raiderlink.ttu.edu](http://raiderlink.ttu.edu), A&F Work Tools tab under Budget. Logging on through Raiderlink with your eRaider ID and password authenticates access to Budget Prep.

The Budget Prep Menu provides access to Reports, TeamApp Security, Budget Transfers, Salary Planner and Budget Development.

Select Budget Development Quick Update – Prepare final Proposed Budget by choosing your FOP from a list of FOPs available for you to view/edit
Budget Development Quick Update

Prepare your final Proposed Budget using Budget Development Quick Update by selecting FOPs.

**Chart of Accounts:**  T (TTU) or S (TTUSA)

**Budget ID:**  T2011 (TTU) or S2011 (TTUSA)

**Budget Phase:**  T11DPT (TTU) or S11DPT (TTUSA)

Click on **List FOP**

![Budget Development Quick Update Form](image)

Select FOP from List and **Submit**

- 31A160 / B61000 / A10 --
- 31A161 / D01001 / A10 --
- 31A163 / B51296 / A10 --
- 841A7R / P00000 / G10 --
- 84A161 / P00000 / G10 --

**Submit**

Budget Worksheet

![Budget Worksheet](image)

**Worksheet Parameters**

<table>
<thead>
<tr>
<th>Chart of Accounts</th>
<th>Texas Tech University</th>
<th>Duration</th>
<th>Permanent Budget</th>
</tr>
</thead>
<tbody>
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<tr>
<td>Budget Phase</td>
<td>T11DPT TTU FY2011 Dept Request</td>
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<tr>
<td>Financial Manager</td>
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</tr>
</tbody>
</table>

**Select Another FOP**

**Jump To Bottom**

The Budget Development Worksheet allows you to make changes to individual budget pools and to delete or add budget pools to your budget. You must select the Post button to save your
Use the Cognos Budget Reports along with the position salary totals fed from Salary Planner to update your Budget Development Worksheet. **NOTE: Do not change salary amounts in Budget Development. Make salary changes in Salary Planner which will automatically update Budget Development.**

- **Status**
  - OPAL = Operating Ledger
  - NEW = Transfer from roster or Code Added

- **Account Type/Code**: Budget Pools provide link to add text

- **Adopted Budget**: FY10 Final Budget

- **Permanent Adjustments**: Reflects **Permanent** Budget Adjustments made in FY10

- **Base Budget**: Total of Adopted Budget and Permanent Adjustments

- **Proposed Budget**: Total of Adopted Budget, Permanent Adjustments and Changes made during Budget Development

- **Budget Duration Code**: P = Permanent

- **Change Value**: Use - to decrease/+ not necessary for increases
  - Enter amount you are changing NOT New Budget total
  - Round to nearest $1.00

- **New Budget**: Totals based on changes entered and Proposed Budget

- **Delete Record**: Will delete budget pool line
Additional budget pools may be added under Account/Program Code lookup – enter budget pool and proposed budget.

- Budget and Accounting will review added budget pools and transfers
- New FOPs are allowable in the Budget Prep Process upon approval from Financial Accounting and Reporting
- Revenue can be increased – add comments through Budget Pool link
- Use **Calculate** to update worksheet changes
- Select **Post** to recalculate and **Save** changes
- Select **Requery** to return to values last posted
- Download Columns to excel for review

Account/Program Code lookup provide list of Budget Pools and Account Codes. Account Codes and Budget Pools are also available under Account on the AFISM crosswalk page: [http://www.depts.ttu.edu/afism/reference/codecharts/](http://www.depts.ttu.edu/afism/reference/codecharts/)

- Salary totals for all “overload” jobs which will continue into FY11 should be budgeted in the Contingency (6Z1) budget pool.