Welcome to
STAR FY13
Budget Input Training
“The best-laid schemes o’ mice an’ men, 
Gang aft agley.”

– Robert Burns, 
from “To A Mouse on Turning Her Up in Her Nest with a Plough”
Getting Help

• Quick Reference Guide in your folders

• STAR Website: http://cfo.asu.edu/budget-star

• Technical questions:
  – STAR Administrators Susan Belhassen and Tod Kemper
    – STARadmin@asu.edu
    – 480-727-0669
Today’s Training Objectives

1. STAR Review
2. Log-in through MyApps
3. Budget Input:
   1. Salary budget input and reporting
   2. Transfers In and Out budget input and reporting
   3. Operations budget input and reporting
      • Local Budget
      • State Budget
STAR Review
STAR Technology

• STAR: Strategic Tracking, Analysis and Reporting (STAR is an ASU term)

• Software by SAP using Excel framework

• Excel-based technology – no table joining or technical query knowledge needed!

• Accessed via MyApps and Citrix plug-in application (Citrix must be downloaded from MyApps for STAR connectivity)
STAR Technology

• STAR holds different types of budget data in an Excel format:
  – Budget Data that assigned users input each year for their units (Working_budget, Original_budget), which is then sent to Advantage.
  – Actuals that come from Advantage (All_Actuals: actual_rev_exp, encumb, pre_encumb).
  – Budget adjustments that come from Advantage (current_budget).
Data Flow

STAR – Reporting
Generally pulls data from Advantage

Advantage – Accounting
Records transaction level data

Original Budget Input
(including cash basis accounts)

Current Budget – updates received from Advantage
(including budget changes made in Advantage)

Actuals summary received – updated daily from Advantage
(all accounts)

Original Budget Received from STAR
(not including cash basis accounts)

Current Budget is updated
(including budget changes made in Advantage)

Actuals transactions are entered
(all accounts)
System Design

• Uses Excel framework

• Multiple ‘Applications’ to choose from based on purpose: Financial, Salary, Transfers & Planning

• General Terminology:
  – Applications  (Financial, Salary, Planning, Transfers)
  – Action Pane
  – Current View
  – Dimensions  (Category, Entity, Object_financial, Time, etc.)
  – Members    (1RPVP30, PJ51001)
  – Facts      ($$$)
  – Intersection The meeting point of all the dimensions that are dialed in on the Current View. It may or may not contain facts.
### STAR Applications

<table>
<thead>
<tr>
<th>Application</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Financial Application</strong></td>
<td>(For all STAR users) Budgeted operations - input by each unit, Budget change &amp; Actual $$'s from Advantage Reporting</td>
</tr>
<tr>
<td><strong>Planning Application</strong></td>
<td>(For SFA access only) State budget balancing numbers, Executive-level, long-term planning</td>
</tr>
<tr>
<td><strong>Salary Application</strong></td>
<td>(For input to make BPC file) Budgeted salaries input annually by each unit Doesn’t reflect PS/ HR actuals</td>
</tr>
<tr>
<td><strong>Transfers Application</strong></td>
<td>(For Budgeted Transfer detail) Budgeted transfer data at the agency/org detail level can be cross referenced. Correlates to the I and O appropriation unit data in Financial.</td>
</tr>
</tbody>
</table>

Application chosen at log-in can be seen and changed at any time in Current View; acts like a new log-in when changing.
And... Action!

STAR’s Action Pane

Action Pane with Current View collapsed

Action Pane with Current View expanded

Getting Started - BPC for Excel

BPC Tasks
STAR Dimensions

- Exist in all Applications – some are shared across applications (such as Campus or Entity)
- Units within each dimension are called Members
- Dimensional/ Member intersections determine the facts/ data

But...

Application isn’t quite a dimension

What are some other terms for Entity members?
Member Lists

1. Click on the dimension name to open up the Member List.

2. You can search via the Search – magnifying glass button (or Ctrl+F).

3. Change your view to ID and Description.
Logging in …

• Open a web browser to MyApps: https://myapps.asu.edu

• Follow “Instructions for Login to STAR through MyApps”
Current View

Upon log-in, the first thing to do is expand Current View. Then, you can start dialing in your desired settings. There are three possible ways to change dimensional settings:

1. **Possibility 1:** Click on the **name** of the dimension to see all available members.
2. **Possibility 2:** Use the dropdown box to see recently used members only.
3. **Possibility 3:** Type the exact member ID and press the "Enter" key.
Action Pane

Current View
(all dimensions and selected members listed)

Menus
(all options available in your current state)
Reporting

2 Main types: Existing (Canned) and Dynamic (Any-by-Any)

- Open existing report

- Build a Report using Dynamic Templates
  - Change columns / rows
  - Save
Open an Existing Report

Remember: Use browser icons to control navigation in your action pane.

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**Open an Existing Report**

**Reporting & Analysis Options**

**Build New**
- Open a blank workbook
- Build a report using drag & drop
- Build a report using a dynamic template

**Open Existing**
- Open an existing report
- Open an existing report from My Report Folder

**Available Interfaces**

**See Also**
FY13 Budget Input
FY13 Budgeting Notes

- Personal Services, ERE and some charges are carried-in to Financial through the Salary Application.
- Transfers In / Out totals are carried-in to Financial through the Transfers Application.
- Sponsored accounts (those whose 3rd character is ‘S’ such as ‘PVS0256’) are being budgeted by the Budget Office – do not budget Sponsored.
- If you have ASC Exempt accounts, expense Objects must first be coded as Exempt in Advantage.
Budget Process Flow

User Input into STAR:
- Input into Salary is aggregated and sent to Financial.
- Input into Transfers is aggregated and sent to Financial.
- Users Input additional data into Financial.

Salary Data:
To ASU Data Warehouse to become BPC file/dashboard.

Financial Data:
To ASU Financial Services for upload into Advantage at the appropriation unit level.
Budgeting in STAR …

Salary budgeting
   1. Input of Personal Services budget - all accounts
   2. View Salary budget reports

Transfers Budgeting
   1. Input of Transfers In and Out for a Local account

Financial budgeting
   1. Input of Operations Budget for a Local account
   2. Input of Operations Budget for a State account
   3. View Operations budget reports
Salary: What’s in STAR

STAR contains current PeopleSoft snapshot data updated daily of All Active Positions and Employees except:

- Positions and Employees associated with “group” Jobcodes (since these should be budgeted on the “group” lines), and
- Positions and Employees associated with summer/winter faculty Jobcodes (again, budget these on “group” lines).

Positions (and Employees) affiliated with the following jobcodes should be budgeted on the “group” lines:

**Group Jobcodes:** 892300, 892310, 892320, 892330, 894800, 981000, 982000, 983000, 984000, 985000, 989001, 989002, 989003, 989004, 989500, 989556, 989557, 994810, 994883, 994885

**Faculty Summer/ Winter Jobcodes:** 894900, 894901, 894902, 894903, 897900, 897901, 897902

**Remember:** To make changes to positions listed in STAR, make the change in PeopleSoft. It will take 1-2 days for PS data to show up in STAR.
Change Application to Salary
Salary Budgeting
Open the Input Schedule
FY13 SALARY BUDGET INPUT SCHEDULE

STEP 1: Choose Entity in Current View

STEP 2: Click Button to Refresh

STEP 3: Enter Budgets in Columns AC and AD

STEP 4: Click Button to Save Budget to Database

STEP 5: After confirmation of records saved, close input schedule (File -> Close)

<table>
<thead>
<tr>
<th>Position ID</th>
<th>Position Name</th>
<th>Employee Name</th>
<th>Distributed Annual Pay</th>
<th>Distributed FTE</th>
<th>Account Distribution Percentage</th>
</tr>
</thead>
</table>
Budgeting Positions in STAR – 3 sections

1. Existing, non-group positions:
   - Budget to each position (existing positions in PS)
   - Can see individual employees and vacant positions

2. Group positions:
   - No individual employees are budgeted to these positions that are affiliated with group jobcodes (i.e. student workers, Winter/Summer faculty)
   - Each STAR summary/group position has an associated empl class and benefits-eligibility – this matters for ERE
   - **NEW!** Student Federal Work Study group line with 6.33% ERE
   - 0% ERE line – optional - to be used only if you want to budget for supplemental pay codes: TEC, HSG, AWP, HNR, BNN, BNS & FRD

3. New Positions:
   - **Only** for individual Positions that don’t exist in PeopleSoft and can’t be created before budget close (possibly due to timing).
FY13 ERE

• ERE is auto-calculated based upon a combination of the Position’s EmplClass and the Employee’s benefits eligibility.

• If No Employee, then default is Benefits Eligible (BEN).

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<thead>
<tr>
<th>COMBO</th>
<th>RATE</th>
<th>Amt</th>
<th>%</th>
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<tbody>
<tr>
<td>ACP_BEN</td>
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<td>0.3960</td>
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<td>ADM_BEN</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>FY13 ERE Rates</th>
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<tbody>
<tr>
<td>ERE_Rate_Staff</td>
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<td>ERE_Rate_Fac</td>
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<td>ERE_Rate_RATA</td>
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<td>ERE_Rate_NONB</td>
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<tr>
<td>ERE_Rate_Studnt</td>
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</tbody>
</table>
Salary Budgeting

• Don’t forget to Refresh after you input your Account/Entity.

• When you save, you must choose “Save Active Worksheet” (not Workbook).

• To clear (zero) an amount, simply enter “0” in the yellow (or green) cell that you want to clear (after closing, reopening and refreshing the template, of course).
After Entering Salary Budget: Summary Reports are Available

Getting Started - BPC for Excel

BPC Tasks
- Open a business process flow
- Open a custom menu

Available Task Categories
- Reporting & Analysis

Reporting & Analysis Options
- Build New
  - Build a report using drag & drop
  - Build a report using a dynamic template
- Open Existing
  - Open an existing report
  - Open an existing report from My Report folder

Star
Strategic Tracking, Analysis and Reporting
Budgeting in STAR …

Salary budgeting
1. Input of Personal Services budget - all accounts
2. View Salary budget reports

Transfers Budgeting
1. Input of Transfers In and Out for a Local account

Financial budgeting
1. Input of Operations Budget for a Local account
2. Input of Operations Budget for a State account
3. View Operations budget reports
Change Application to Transfers
Transfers In and Out

• The Account Description column will only be populated if a valid Entity is entered. This input schedule will not send data unless a valid Entity has been entered.

• This schedule can be used to send a nearly infinite number of budgeted Transfers In or Transfers Out, 16 rows at a time.
  – If you need more than 16 rows, simply fill them all up with data, send the input schedule and refresh. The schedule will save all the input to the database and give a fresh 16 rows ready for more input!

• TBD and Various are no longer available. Each entry gets its own input row (no more combining into one row).

• No more worrying about sending Worksheet!
Transfers In and Out

• As you send data and refresh, your saved data appears in a summary above the input areas.

• Entering a transfer in or out for one account does not automatically enter a corresponding transfer out or in for the other account involved. The counterpart transfer must be budgeted separately, and these are being audited and reconciled to ensure they balance.

• There is a report available to show you if another Entity (Agency/Org) has budgeted that they plan to send or receive monies from your Entity (Agency/Org).

• Select only Local Accounts.
Open Transfers Input Schedule
Transfers Data Input

- Follow instructions at top of template.
- Don’t forget Step #2, Refresh. Refreshing after a Send is complete (as an implied Step 5), will show all current saved data.
- The Update button can be used if you need to zero out an incorrect entry.
Transfers
Data Input

Input Transfers-In here. →
(See circled areas.)

Input Transfers-Out here. →
(See circled areas.)
After **Refreshing** post-send, data can be seen in the Currently Saved summary areas.

Transfers-In detail data now saved in the STAR database. →

Transfers-Out detail data now saved in the STAR Transfers database. →
After Entering Transfers Budget: Open a Report
Budgeting in STAR …

Salary budgeting
1. Input of Personal Services budget - all accounts
2. View Salary budget reports

Transfers Budgeting
1. Input of Transfers In and Out for a Local account

Financial budgeting
1. Input of Operations Budget for a Local account
2. Input of Operations Budget for a State account
3. View Operations budget reports
Change Application to Financial
Open Local Budget Input Schedule
Local Operations Budgeting

Pre-populated Inputs

- **Beginning Balance** for FY13 is pre-populated based upon the FY12 3rd Quarter Forecast ending balance.

- **Personal Services (P)** and **ERE (E) budgets** are carried in from the Salary application.

- **Transfers In / Out (I, O) budgets** are carried in from the Transfers Application.

- If you have budgeted Personal Services, you will also see the calculated **Risk Management assessment (731012), Technology (Netcomm) fee (731020).**

- **ASC (790001)** is auto-calculated as a percentage of Personal Services + ERE + All Other Operating; you do not need to enter it. The ASC on Personal Services + ERE is calculated in the Salary application; the ASC on All Other Operating is calculated here.

(Shown on next slide.)
Operations Budgeting

- Follow the directions at the top of the Input Schedule.
- Don’t forget to Refresh after selecting Entity.
- Make sure you have selected the appropriate type of funded account (State or Local) for your Input Schedule.
## FY13 LOCAL BUDGET INPUT SCHEDULE

**STEP 1:** Double-Click Cell to Select an Account  
- **no_entity** - Not Entity Specific Data

**STEP 2:** Click Button to Refresh  
- You have selected a roll-up, sponsored, state or inactive account. Please change your Entity and click Refresh.

**STEP 3:** Enter Budget in Column Z (light yellow cells for input)

**STEP 4:** Click Button to Save Budget to Database  
- Save Data

<table>
<thead>
<tr>
<th>B</th>
<th>2011 Total</th>
<th>2011 Total</th>
<th>2012 Total</th>
<th>2012 Total</th>
<th>2012 Total</th>
<th>2013 Saved</th>
<th>Enter FY13 Working Budget</th>
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</thead>
<tbody>
<tr>
<td>Beginning Balance</td>
<td>53,432</td>
<td>41,200</td>
<td>98,018</td>
<td>109,000</td>
<td>364,002</td>
<td></td>
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<tr>
<td>I TRANSFERS IN</td>
<td>44,586</td>
<td>188,950</td>
<td>323,002</td>
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<td>Other:</td>
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<tr>
<td><strong>Revenues (excluding beginning balance)</strong></td>
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<td>720048 RA EMPLOYEE TUITION BEN FLAT</td>
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<tr>
<td>790001 ADMINISTRATIVE SERVICES CHARGE</td>
<td>(0)</td>
<td>2,714</td>
<td>1,985</td>
<td>4,085</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>731012 RISK MGT INSURANCE ASSESSMENT</td>
<td>(0)</td>
<td>1,926</td>
<td>1,721</td>
<td>3,631</td>
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<tr>
<td>731020 TECHNOLOGY FEE</td>
<td>(0)</td>
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<td>D DIRECT COST OF SALES</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td>(0)</td>
<td>240,150</td>
<td>207,713</td>
<td>(35,000)</td>
<td>436,147</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Ending Balance</strong></td>
<td>98,018</td>
<td>-</td>
<td>219,307</td>
<td>364,002</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Input into Yellow area.

Input revenue budgets at the 4-digit object code level (5210, 5220, 5310, etc.). This section begins just below the summary section.

**ASU Foundation** revenue (539005), which *must* be budgeted at the expenditure sub-object level separately from all other grant/contract/gifts revenues (53XX). When entering any other 53XX amounts, do not include the Foundation revenue or you will be duplicating that part of your budget.
Local Operations Budgeting
Expense Data Input

• Input into Yellow area.
• Only the Direct Cost of Sales (D), Financial Aid (F) available for input at Appropriation Unit level.
• TA and RA Employee Tuition Benefit (720049 & 720048) budgeted individually in summary area.
• Remaining expenses are either prepopulated or AOO.
• Budget AOO at Object and Sub-object levels.
• Be careful not to duplicate dollars input at various levels of AOO. Historical data on the input schedule auto-calculates the detail to the total A, but the current year being input does not do this.
• Input Utilities (7350) and Capital Equipment (7810) in their corresponding Object areas.

(Shown on next slide.)
### 2013 Saved Working Budget

<table>
<thead>
<tr>
<th>Budget AOO at Object Level:</th>
<th>Enter FY13 Working Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SERVICES</strong></td>
<td></td>
</tr>
<tr>
<td>7310</td>
<td></td>
</tr>
<tr>
<td>7314 SUBAGRMTS LT $25,000(SP ONLY)</td>
<td>+</td>
</tr>
<tr>
<td>7315 SUBAGREEMENTS (SP ONLY)</td>
<td></td>
</tr>
<tr>
<td>7320 MATERIALS AND SUPPLIES</td>
<td></td>
</tr>
<tr>
<td>7325 NON-CAPITAL EQUIPMENT</td>
<td></td>
</tr>
<tr>
<td>7330 COMMUNICATIONS</td>
<td></td>
</tr>
<tr>
<td>7340 RENTALS/LICENSES</td>
<td></td>
</tr>
<tr>
<td><strong>UTILITIES</strong></td>
<td></td>
</tr>
<tr>
<td>7350</td>
<td></td>
</tr>
<tr>
<td>7390 MISCELLANEOUS</td>
<td></td>
</tr>
<tr>
<td>7400 PARTICIPANT EXPENSES</td>
<td></td>
</tr>
<tr>
<td>7510 TRAVEL/IN-STATE</td>
<td></td>
</tr>
<tr>
<td>7520 TRAVEL/OUT-OF-STATE</td>
<td></td>
</tr>
<tr>
<td>7530 TRAVEL/FOREIGN</td>
<td></td>
</tr>
<tr>
<td>7560 TRAVEL/ATHLETIC</td>
<td></td>
</tr>
<tr>
<td><strong>CAPITAL EQUIPMENT</strong></td>
<td></td>
</tr>
<tr>
<td>7810</td>
<td></td>
</tr>
<tr>
<td>7880 OTHER CAPITAL-EXTERNAL CONTRACT</td>
<td></td>
</tr>
<tr>
<td>7890 OTHER CAPITAL</td>
<td></td>
</tr>
<tr>
<td>8204 RETIREMENT OF INDEBTEDNESS</td>
<td></td>
</tr>
<tr>
<td>8205 INTEREST ON INDEBTEDNESS</td>
<td></td>
</tr>
<tr>
<td><strong>OTHER OPERATING EXPENSES</strong></td>
<td></td>
</tr>
<tr>
<td>7310 SERVICES</td>
<td></td>
</tr>
<tr>
<td>73101 CONSULTANTS FEES</td>
<td></td>
</tr>
<tr>
<td>731002 CONSULTANTS REIMBURSED EXPENSE</td>
<td></td>
</tr>
<tr>
<td>731003 EXTERNAL PEER REVIEW CONSULTANT</td>
<td></td>
</tr>
<tr>
<td>731004 LECTURER'S FEES</td>
<td></td>
</tr>
<tr>
<td>731005 EXPENSE HONORARIUM</td>
<td></td>
</tr>
</tbody>
</table>

### Budget AOO at Expenditure Code Level:

<table>
<thead>
<tr>
<th><strong>SERVICES</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>7350 UTILITIES</td>
<td></td>
</tr>
<tr>
<td>735001 ELECTRICITY (UTILITY)</td>
<td></td>
</tr>
<tr>
<td>735005 GAS FOR BUILDINGS (UTILITY)</td>
<td></td>
</tr>
<tr>
<td>735010 WATER (UTILITY)</td>
<td></td>
</tr>
<tr>
<td>735012 CHILLED WATER (UTILITY)</td>
<td></td>
</tr>
<tr>
<td>735014 STEAM (UTILITY)</td>
<td></td>
</tr>
<tr>
<td>735015 DIESEL (UTILITY)</td>
<td></td>
</tr>
<tr>
<td>735090 UTILITY SERV ALLOCATIONS</td>
<td></td>
</tr>
<tr>
<td>735099 OTHER UTILITIES</td>
<td></td>
</tr>
</tbody>
</table>
Open State Budget Input Schedule
State Operations Budgeting

• Very similar to Local, but with no Revenue Input.
• Everything other than AOO is pre-populated.
• Input into Yellow area.
• Budget AOO at Object and Sub-object levels.
• Be careful not to duplicate dollars input at various levels of AOO. Historical data on the input schedule auto-calculates the detail to the total A, but the current year being input does not do this.
• Input Utilities (7350) and Capital Equipment (7810) in their corresponding Object areas.

(Shown on next slide.)
# FY13 STATE BUDGET INPUT SCHEDULE

**STEP 1:** Double-Click Cell to Select an Account  -->

**STEP 2:** Click Button to Refresh  -->

**STEP 3:** Enter Budget in Column Y (light yellow cells for input)

**STEP 4:** Click Button to Save Budget to Database  -->

<table>
<thead>
<tr>
<th>2011 Total</th>
<th>2011 Total</th>
<th>2012 Total</th>
<th>2012 Total</th>
<th>2012 Total</th>
<th>2013 Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual</td>
<td>Original Budget</td>
<td>Actual</td>
<td>Year End Forecast</td>
<td>Original</td>
<td>Working Budget</td>
</tr>
</tbody>
</table>

| P          | PERSONAL SERVICES |          |          |          |            |
| E          | EMPLOYEE RELATED EXPENSES |          |          |          |            |
| A          | TOTAL ALL OTHER OPERATING | -        | -        | -        | -          |
| 731020     | TECHNOLOGY FEE Expenses |          |          |          |            |

## INPUT ALL OTHER OPERATING

**Budget AOO at Object Level:**

- **7310** SERVICES (excluding 731020 tech fee)
- **7320** MATERIALS AND SUPPLIES
- **7325** NON-CAPITAL EQUIPMENT
- **7330** COMMUNICATIONS
- **7340** RENTALS/LICENSES
- **7350** UTILITIES
- **7390** MISCELLANEOUS
- **7400** PARTICIPANT EXPENSES
- **7510** TRAVEL/IN-STATE
- **7520** TRAVEL/OUT-OF-STATE
- **7530** TRAVEL/FOREIGN
- **7560** TRAVEL/ATHLETIC
- **7810** CAPITAL EQUIPMENT
What to do with a Report?

Close Template without saving changes

OR

Save as a Report on your computer/network drive

1. From the Microsoft Office menu, choose Save As.
2. On the left side, click on the icon called “My Network Places.”
3. Next, where it says File name, type in: \Client\X$ (in place of ‘X’, substitute the letter of your network drive or drive to which you want to save and press Enter).
4. Your drive directory will appear. Navigate to the desired location, name your file and Save (click Save when done).
Open Reports for Budget Summary Review
Tips

- Make sure you are in the right Application (or you won’t find the right input schedules/reports).
- **Always Refresh** (and wait for Refresh to complete) before you start typing.
- Save to Work**sheet** (not Workbook).
- Open multiple windows for input into multiple Applications.
- Wait for “Success” message when saving budget to database.
- Close and reopen the input schedule between accounts.
- Use reports for final budget review.
- Give yourself enough time.
- If STAR freezes (give it up to 5 minutes for Financial and Transfers, but up to 10 minutes Salary), send email to **STARAdmin@asu.edu** for a “kill session.”
Resources

• Office of Planning & Budget website:
  – http://cfo.asu.edu/budget

• STAR website (download budget information, STAR documentation and training videos):
  – http://cfo.asu.edu/budget-star

• Budget questions: Contact your budget representative (Office of Planning and Budget Liaison)

• Technical questions: Contact STARadmin@asu.edu or 480-727-0669
Building a Dynamic Template

AKA: Any-by-any

HINT: Use “Home” and “Back” if Action Pane doesn’t show “Reporting & Analysis”

Step 1: Click “Reporting & Analysis”

Step 2: Click “Build a report using a dynamic template”

Step 3: Double-Click on desired template

Preset your current view with the most specific dimension members for your reporting needs. Once the report is created, change can be a SLOW process in STAR.
Template – Row & Column Display

Choose dimension to display in Columns

Choose dimension to display in Rows

Hint: you may have to scroll up or down on the dropdown list to find a dimension

Report automatically refreshes after you change your display selection (data still based on Current View)

Patience… it can be slow…