Welcome to
STAR FY14
Budget Input Training
Getting Help

• Quick Reference Guide in your folders
• STAR Website: http://cfo.asu.edu/budget-star
• STAR Blackboard Course
• Business Process questions:
  – Please contact your Senior Business Officer or your Office of Planning and Budget Analyst liaison.
• Technical questions, STAR Administrators:
  – Susan Belhassen and Tod Kemper
  – STARadmin@asu.edu, 480-727-0669
Today’s Training Objectives

1. STAR Vocab Review
2. Log-in through MyApps and STAR Navigation
3. Budget Input
4. Budget Reports
STAR Review
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>Financial Application (For all STAR users)</td>
<td>Budgeted operations - input by each unit Budget change &amp; Actual $$'s from Advantage Reporting</td>
</tr>
<tr>
<td>Planning Application (For SFA access only)</td>
<td>State budget balancing numbers Executive-level, long-term planning</td>
</tr>
<tr>
<td>Salary Application (For input to make BPC file)</td>
<td>Budgeted salaries input annually by each unit Doesn’t reflect PS/ HR actuals</td>
</tr>
<tr>
<td>Transfers Application (For Budgeted Transfer detail)</td>
<td>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

Application 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

Session Information
- Logon: sbelhass - STARappset
- CV: FINANCIAL - ALL_CAMPUSES - ACTUAL_REV_EXP - ALL_DATA_SOURCES - 1RPR00 - ALL_FUNDS_BY_NUMBER - RevenueAndExpense-2011.total-Periodic

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:

Possibility 1: Click on the **name** of the dimension to see all available members.

Possibility 2: Use the dropdown box to see recently used members only.

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)

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

• Reports - Two main types: Existing (Canned) and Dynamic (Any-by-Any)
  – Open existing report, OR
  – Build a Report using Dynamic Templates

• Data Input - One type:
  – Open Existing Input Schedule
Open an Existing Report

Remember: Use browser icons to control navigation in your action pane.
Open an Input Schedule

Remember: Use browser icons to control navigation in your action pane.
FY14 Budget Input
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.
FY14 Budgeting Notes

• All budgeting occurs in one workbook. No need to change applications.

• Personal Services, ERE, Transfers in/Out totals and some charges are carried-in to the BudgetInput worksheet tab from the SalaryInput and TransfersInput worksheet tabs.

• Please do not budget sponsored accounts. The input schedule shouldn’t allow it, but some still get through.

• If you have ASC Exempt accounts, expense Objects must first be coded as Exempt in Advantage.

• If you budget APPR or Bud Ref cash basis accounts, budget only the _APPR or only the Advantage accounts.
Budgeting in STAR …

For FY14 Budget Input, there is only one workbook with a worksheet tab for each budget input area:

1. FY13 Forecast Input
2. FY14 Salary Input
3. FY14 Transfers Input
4. FY14 Budget Input

When you open the Input Schedule, a Budget Input dialog box pops up letting you choose which areas you’d like to budget this session.
Open the Input Schedule

Getting Started

Tasks
Open a business process flow
Open a custom menu

Available Task Categories

Reporting & Analysis
Open System Reports

Available Interfaces

Data Input
Journals
Manage Data

Open the Input Schedule

Data Input Options

Build New
Open a blank workbook
Build a schedule using drag
d build a schedule using a dynamic template

Open Existing
Open an existing schedule
Open an existing schedule from My

Open

File name: FY14 Budget Input Workbook.xlsx
File of type: All Excel Files (*.xls; *.xlsx; *.xlsm; *.xltx; *.xltm)

Star
Strategic Tracking, Analysis and Reporting
Select the Budget Input Box

**NOTE:** The more boxes you select, the longer it takes for the workbook to Open and Refresh. Best Practice: Select only the sheets you need for your session.

After you’re already in the workbook, you can “Start Over” to open up the Budget Input dialog box again.
Follow the Instructions, Steps 1-4.

Input data into the Yellow cells

FY13 Forecast Ending Balance rolls to FY14 Beginning Balance
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.
FY13 Salary Input Tab

**FY14 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)

---

**Position ID** | **Position Name** | **Employee Name** | **Distributed Annual Pay** | **Distributed FTE** | **Account Distribution Percentage** | **FY14 Budget**
--- | --- | --- | --- | --- | --- | ---
F116210 | Position #1 | Employee 1 | $28,388 | 0.25 | 25% | $30,000 | 0.25 | $1,220 | $1,220 | 37.40%
F101921 | Position #2 | Employee 2 | $13,917 | 0.25 | 25% | $10,000 | 0.25 | $0 | $0 | 37.40%
F101922 | Position #3 | Employee 3 | $57,609 | 0.25 | 25% | $50,000 | 0.25 | $0 | $0 | 37.40%
F101923 | Position #4 | Employee 4 | $51,750 | 0.25 | 25% | $45,000 | 0.25 | $6,750 | 37.40%
F101924 | Position #5 | Employee 5 | $4,408 | 0.25 | 25% | $3,000 | 0.25 | $1,408 | $1,408 | 37.40%
F101925 | Position #6 | Employee 6 | $28,515 | 0.25 | 25% | $30,000 | 0.25 | $0 | $0 | 37.40%
F101926 | Director Budget Operations | No Employee | $0 | 0.25 | 25% | $0 | 0.25 | $0 | $0 | 37.40%
F116211 | Specialist | No Employee | $0 | 0.25 | 25% | $0 | 0.25 | $0 | $0 | 37.40%
F116212 | Strategic Plan/Budg Analyst | No Employee | $0 | 0.25 | 25% | $0 | 0.25 | $0 | $0 | 37.40%
F116213 | Strategic Plan/Budg Analyst | No Employee | $0 | 0.25 | 25% | $0 | 0.25 | $0 | $0 | 37.40%
F116214 | Strategic Plan/Budg Analyst | No Employee | $0 | 0.25 | 25% | $0 | 0.25 | $0 | $0 | 37.40%
F116215 | Strategic Plan/Budg Analyst | No Employee | $0 | 0.25 | 25% | $0 | 0.25 | $0 | $0 | 37.40%
F116216 | Strategic Plan/Budg Analyst | No Employee | $0 | 0.25 | 25% | $0 | 0.25 | $0 | $0 | 37.40%
F116217 | Strategic Plan/Budg Analyst | No Employee | $0 | 0.25 | 25% | $0 | 0.25 | $0 | $0 | 37.40%
F116218 | University Fiscal/Plan/Folog A | No Employee | $0 | 0.25 | 25% | $0 | 0.25 | $0 | $0 | 37.40%

Total - Existing Positions: 164,476 | 1.50 | 173,609 | 1.50 | 56,870 | 25%
FY14 Salary Input Tab

• As you input the Personal Service and Distributed FTE amounts, ERE and charges are auto-calculated.

• When you save your Salary budget data, these charges will also be saved and will then appear in their corresponding expense areas in the BudgetInput Tab.

• Your total Personal Services that you just budgeted will also appear in the ‘P’ personal Services Appropriation Unit on the BudgetInput tab.

• Please input FTE every place you budget Personal Services (except where the cells are grayed out—such as with the student group lines). For group summary positions make a best estimate cumulative number.

• Budgeted FTE is different than PeopleSoft FTE. Budgeted FTE is based upon the number of hours an employee works per year, whereas PeopleSoft FTE is based upon the number of hours an employee works per pay period.
  • Calculable rule of thumb: for Staff (12 months), take # of hrs paid in a year divided by 2080 to determine FTE. For Faculty (9 months), take # of hours paid in a year/1560.
Budgeting Positions in STAR – 3 sections

1. Existing, non-group positions:
   – You can see all active positions set up in PeopleSoft.
   – Input Distributed Annual Pay and FTE where desired (just because a positions shows up doesn’t mean you have to put an amount there).
   – ERE and Charges are calculated.

2. Group positions:
   – These are hard-coded for group jobcode positions (i.e. student workers, Winter/Summer faculty) that are budgeted as a lump sum.
   – Student Federal Work Study group line with 9.33% ERE
   – Input Distributed Annual Pay lump sum amount and approx FTE for all groups budgeted except Student Worker.
   – 0% ERE line – optional - to be used only if you want to budget for supplemental pay codes: TEC, HSG, AWP, HNR, BNN & BNS

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).
FY14 Transfers Input Tab

- Input Data into Yellow Cells
FY14 Transfers Input Tab

Follow Instructions Steps 1-4.

<table>
<thead>
<tr>
<th>I</th>
<th>M</th>
<th>N</th>
<th>E</th>
<th>I</th>
<th>P</th>
<th>Q</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**FY14 TRANSFERS INPUT SCHEDULE**

**STEP 1:** Enter Account into Entity in Current View at right and press Enter, or double-click Cell M16.

**STEP 2:** Click Refresh button. Wait until ‘Ready.’ Or Click Add Rows if Refreshed from a different Tab.

**STEP 3:** Input your budgeted Transfers In and Out.

**STEP 4:** Click Send. Refresh and Review for accuracy when completion message appears.

---

**RV51007 OUTLOOKSOFT BUDGET SYSTEM**

<table>
<thead>
<tr>
<th>From Agency/Org</th>
<th>Description</th>
<th>FY13 Original Budget</th>
<th>FY14 Working Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ADD NEW TRANSFERS IN**

<table>
<thead>
<tr>
<th>From Agency/Org</th>
<th>Description</th>
<th>FY14 Working Budget</th>
<th>Amount of Transfer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Account Transfers In Currently Saved in STAR**

<table>
<thead>
<tr>
<th>From Agency/Org</th>
<th>Description</th>
<th>FY13 Original Budget</th>
<th>FY14 Working Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL TRANSFER IN TO BE ADDED TO STAR DATABASE**

<table>
<thead>
<tr>
<th>To Agency/Org</th>
<th>Description</th>
<th>FY14 Working Budget</th>
<th>Amount of Transfer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ADD NEW TRANSFERS OUT**

<table>
<thead>
<tr>
<th>To Agency/Org</th>
<th>Description</th>
<th>FY14 Working Budget</th>
<th>Amount of Transfer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Account Transfers Out Currently Saved in STAR**

<table>
<thead>
<tr>
<th>To Agency/Org</th>
<th>Description</th>
<th>FY13 Original Budget</th>
<th>FY14 Working Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL TRANSFER OUT TO BE ADDED TO STAR DATABASE**

|               |             |                     |                   |
Follow Instructions Steps 1-4.

Select 'OK'
Budget Input Tab
Revenue Data Input

- 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/gift revenues (53XX). When entering any other 53XX amounts, do not include the Foundation revenue or you will be duplicating that part of your budget.
Budget Input Tab
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) and General Fund Expense Transfer (720040) are 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.
ASC Exemptions are coded in Advantage Objects
Notes

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

• If prompted to save “Active Workbook” or Active Worksheet,” select “Save Active Worksheet” (not Workbook).

• To clear (zero) an amount, simply enter “0” in the yellow (or green) cell that you want to clear.
Tips

• **Always Refresh** (and wait for Refresh to complete) before you start typing.

• To clear (zero) an amount, simply enter “0” in the yellow (or green) cell that you want to clear.

• If prompted, Save to Work**sheet** (not Workbook).

• 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.”
END
Step 1: Click “Reporting & Analysis”

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

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

Step 3: Double-Click on Any-by-Any template

Reporting & BONUS! Building a Dynamic Template

AKA: Any-by-any

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…