Log-in to the system

Enter your BLAZERID and password to log into the BudgetWorks website.

Below is the Main Dashboard for the system.

Review your approver settings in View/Submit Approvers
Select **View/Submit Approvals** on the main dashboard.

Select **Review Users and Approvals**.

Use **Search Fields** to filter by Org, Org Range or BlazerID.
To view transfers and labor source transactions that are pending on your accounts. Go to View/Submit Approvals on the Main Dashboard, then click View Pending Transfers or View Pending Labor Sources.

Both of these screens function the same way and will show you all of the transfers and labor sources that are pending someone else’s approval. These screens are view only.
Click **Build Personnel Budget** on the main dashboard. This will take you to a secondary dashboard with three options. To enter your personnel budget for your organization, click **Build**.

Use the **Search Fields** to filter your data by Org, Org Range, Employee Name, Job Title, etc.
Your positions are listed in order of position number. Under each position are listed the assignments and labor sources for each assignment.

To add a new position click the **Add New Position** button in the upper left hand corner of the screen. You will then be prompted to enter the following information in a pop-up window.

Once you have entered the information click **Create** and your position will be added and will show in gold to note changes made on the screen.
To add an assignment under a position, click the **Actions** button and select **Add New Assignment** on the drop-down. You will then be prompted to enter the following information on a pop-up window.

Once you have entered the information click **Create** and the assignment will be added to the position, as well as the first labor source you entered on the pop-up window. To add an additional labor source, click the **Actions** button located on the assignment line and select **Add Labor Source** on the drop-down.

Once you have entered your labor source information, click **Create**.

To edit the assignment or labor source information click the **Actions** button on the assignment and select **Edit** from the drop-down.
On this pop-up you will be able to edit the assignment details, delete the assignment, edit the labor source information, delete labor source, and view pending distributions. If you select the **delete checkboxes**, click **Delete** in order to remove these. If you have make changes, select the **Save** button.

**Note:** You can also delete positions once you have deleted all the assignments under that position.

**Building Funded Positions**

Note: Funded positions are positions that are housed in an organization outside of your organizations, but are partially funded by one of your organizations’ accounts.

To add a funding source to a position on this screen, select **Add New Distribution** in the upper left corner and enter the information on the pop-up window as shown below.
Note: Assignments housed in any of the organizations that you have access to will not show on this screen. The only names and assignments that will show in the lookup are those that are outside of your orgs.

Viewing Your Personnel Budget by Account and Object Codes

To view your personnel information by account/object code select View Account Breakdown on the Build Personnel Budget dashboard. An example is shown below

Note: This screen is view only and translates the information entered on your build screen to the appropriate object code. This screen shows what will be uploaded for the budget into Oracle.
Use the **Search Fields** to filter your data by Org, Org Range, Alias, Short Name, Ledger type, or Account Status.

**Building Your Operating Budget**
Use the **Search Fields** to filter your data by Org, Org Range, Account Alias, Short Name, Ledger Type or Account Status. Your accounts will be listed in order of account number.

On this page you will enter your budget by object code.

To add a new object code click **Actions**, then **Add Object Code**. You will then need to select the object code you want to add and entered a proposed amount for that object code in the pop-up shown below. Note: you can search by number or name.

The account you added to will then be highlighted in gold as will all accounts that you make changes to while on this screen.
You can edit the amount on the object codes in an account by selecting the Actions button on that account and changing the proposed amounts. To delete a newly added object code, you will simply need to zero out the proposed amount.

Note: Object codes with amount budgeted in previous year will not be removed from the list if you zero them out.

Building Your Revenues Budget
Use the **Search Fields** to filter your data by Org, Org Range, Account Alias, Short Name, Ledger Type or Account Status.

Your accounts will be listed in order of account number.

On this page you will enter your revenue amounts by object code.

Note: No grouping will be used on revenue object codes and you will not be able to bucket on this screen.

To add an object code to an account, click on the **Actions** button on that account and select **Add Object Code** from the drop-down.
You will then need to select an object code and entered a proposed amount for that object code in the pop-up shown below.

Note: Remember to add revenues using negative amounts.

To edit the proposed amount in the listed object codes, click the Actions button on that account and select Edit. Edit the proposed amounts listed in the pop-up and click Save.
Adding Transfers

Transfers are entered differently than operating expenses and revenues. On this page you will see all the transfers you have entered, and any other transfers entered on any of your accounts. You can filter your results using the Search Fields at the top of the page and filter by Org, Org Range, Transfer Type, Account Alias, or Short Name.

To add a new transfer, click the Add Transfer button located at the top left on the screen.
Enter the information on the pop-up for your transfer.

Note: Be sure to enter the account matching the transfer code type in the first account box. Example: If you select Transfer in select the account receiving the funds first, then the account transferring the funds in the Offset Account. Comments are required for all transfers entered.

Transfers will enter a pending status unless both accounts are under your orgs. The transfer will need to be approved by an approver in the offset account’s org.

Approving Labor Sources and Transfers Requested
Click the **View/Submit Approvals** button on your main dashboard

On the View/Submit Approvals dashboard, your action buttons are the second row of buttons that say “Approve”.

To approve transfers and labor sources requested for one of the accounts in your orgs. Select the buttons **Approve Transfers** or **Approve Labor Sources**. These screens work the same way and will list any requests that you can take action on.
To approve select the checkbox and click **Approve Selected**. To reject the request, select the check box and click **Reject**. If you reject a request you will be required to enter a comment explaining why you rejected.

**Approving Your Accounts**

Click **View/Submit Approvals** on the main dashboard. This will take you to a secondary dashboard, click **Approve Accounts**.
Select the checkbox for the account you want to approve, scroll to the bottom of the page and click Approve Selected.

Note: You may also click multiple accounts or select all to approve up to 20 accounts at a time.
FY 2018 Enhancement – Build Global Percentages

The Build Global Percentages options are available on the Build Personnel Budget, Build Operating Budget and Build Revenue Budget screens for FY 2018. This enhancement gives users the ability to apply an across-the-board percentage increase based upon the selected criteria.

Below are instructions for utilizing the Build Global Percentages options.

**Build Personnel Budget – Global Percentages**

Access the Build Personnel Budget screen from the My Dashboard screen.

Click on Build Global Personnel Budget from the Build Personnel Budget screen.

**Helpful Hint:** When global percentages are applied using the Build Global Percentage screen, individual changes can be made at the assignment level, using the Build screen.
The **Build Personnel Budget: Global Percentages Positions** screen will open displaying all employees with active assignments within the users’ access.

Use the **Search Fields** to filter data by Org, Org Range, Position Number, Job Title, Assignment Category, Employee Name or Account Alias.

Active assignments within the search criteria will display.

Enter the percentage to be applied globally in the **Global %** box.
Clicking in the Select Page check box selects all assignments listed on the current page.

Click Apply; the screen will change colors and the Proposed, CFB, Total and $Diff/%Diff columns will calculate for selected assignments on the current page. If multiple pages exist, navigate to the next page and complete the above instructions for each page.

Note: Select/Un-Select individual employees by clicking directly in the Select checkbox.

Helpful Hint: Once a global percentage is applied, entering -100 in the Global % field will remove the percentage applied, returning the FY 2018 Proposed column to zero (0).
Build Operating Budget: Global Percentages

Access the Build Operating Budget screen from the My Dashboard screen.

Click on the Build Global Operating Budget from the Build Operating Budget screen.

Helpful Hint: When Global Percentages have been applied using the Build Global Operating Budget screen, individual changes can still be made at the account/object code level, on the Build screen.

The Build Global Operating Budget screen will open displaying all operating accounts within the users’ org code/range access

Use the Search Fields to filter the data by Org or Org Range.
Enter the percentage to be applied to all object codes within the selected account sections in the **Global %** box.

Clicking in the **Select Page** check box selects all account sections listed on the **current page**. A checkmark will show in the Section Total: checkbox for all account sections.

**Note**: When multiple pages display, the **Global %** must be applied to each page.

**Note**: Select/Un-Select individual account sections by clicking directly in the Section Total: checkbox.
Click **Apply**; the account sections selected will change colors and the **Proposed, $Diff, and %Diff** columns will calculate on the current page.

If multiple pages exist, navigate to the next page and complete the above instructions for each page.
Build Revenue: Global Percentages

Access the Build Revenues Budget screen from the My Dashboard screen.

Click on the Build Global Revenue Budget from the Build Revenue Budget screen.

The Build Global Revenue Budget screen will open displaying all revenue accounts within the users’ org code/range access.

**Helpful Hint:** When Global Percentages have been applied using the Build Global Revenue Budget screen, individual changes can still be made at the account/object code level, on the Build screen.

Use the Search Fields to filter the data by Org or Org Range.
Enter the percentage to be applied to all object codes within the selected account sections in the **Global %** box.

Clicking in the **Select Page** check box selects all account sections listed on the **current page**. A checkmark will show in the Section Total: checkbox for all account sections.

Click **Apply**; the account sections selected will change colors and the **Proposed, $Diff, and %Diff** columns will calculate on the current page.
### REVENUE ACCOUNT ONE

<table>
<thead>
<tr>
<th>Object Code</th>
<th>Description</th>
<th>Prior FY Actual</th>
<th>Current FY Actual</th>
<th>Original Budget</th>
<th>Revised</th>
<th>Proposed</th>
<th>$Diff</th>
<th>%Diff</th>
</tr>
</thead>
<tbody>
<tr>
<td>600190</td>
<td>STATE APPROP-ASETF</td>
<td>(13,796,000)</td>
<td>(6,909,069)</td>
<td>(13,796,000)</td>
<td>(13,796,000)</td>
<td>(14,071,926)</td>
<td>(275,926)</td>
<td>2.0</td>
</tr>
</tbody>
</table>

### REVENUE ACCOUNT TWO

<table>
<thead>
<tr>
<th>Object Code</th>
<th>Description</th>
<th>Prior FY Actual</th>
<th>Current FY Actual</th>
<th>Original Budget</th>
<th>Revised</th>
<th>Proposed</th>
<th>$Diff</th>
<th>%Diff</th>
</tr>
</thead>
<tbody>
<tr>
<td>600190</td>
<td>INDR COST RECOV REV</td>
<td>(1,425,451)</td>
<td>(674,164)</td>
<td>(1,348,127)</td>
<td>(1,348,127)</td>
<td>(1,375,095)</td>
<td>(26,965)</td>
<td>2.0</td>
</tr>
</tbody>
</table>

**Helpful Hint:** Once a global percentage is applied, entering **-100** in the Global % field will remove the percentage applied, returning the FY 2018 Proposed column to zero (0).

If multiple pages exist, navigate to the next page and complete the above instructions for each page.