

## BI-IP Reallocation Planning

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### Location(s):

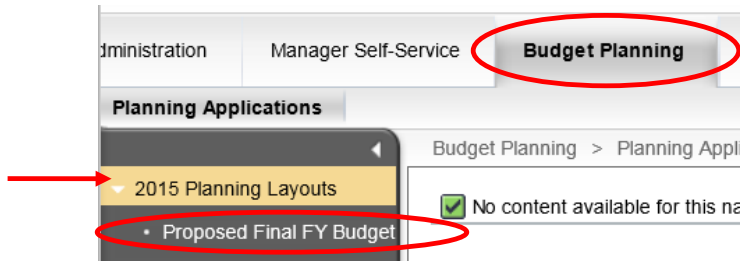
#### Budget Planning tab

**Purpose:** **BI-IP** is available once a year for University fiscal budget planning. The unit reallocation planning layout for Deans, Chairs, Directors, and Unit Administrators is available through the customer portal (<https://mynku.nku.edu/irj/portal>).

### Pooled Operating Commitment Item Budget Alignment Process:

- The staff of the Budget Office and the staff of Financial and Operational Auditing recommends Unit Administrators realign the budget of the current commitment items to the amount that you project to expense to each commitment item for FY 2014-2015. There is no change in the function of the operating pool commitment items; a commitment item with no budget can still be used to charge actual expenses and will still pool at the Operating Pool level. (*You are not required to make these changes.*)
- This process will help Budget Administrators manage the Operating Pool expense account by individual Commitment Item (Office Supplies, Printing, etc.).
- The process in BIIP for moving budgeted funds between Commitment Items within a Fund Center within the Pooled Operating group of Commitment Items is not mandatory.
- The R-3 Financial SAP systems (live accounting system) budget-checks all Pooled Operating Commitment Items at the 550000 Pooled operating level.
- Budget Administrators can still spend out of any Commitment Item regardless of budget in that Commitment Item.
- The Budget Administrator need only stay within the limit of the total pool of operating funds in the 550000 Pooled Operating line. (I.e. the 550000 Pooled Operating line should never go into credit balance status any time during the year)

1. Log into myNKU
  - a. <https://myNKU.nku.edu/iri/portal>
2. Select the Budget Planning tab.
3. Expand the 2015 Planning Layouts.
4. Click the Proposed Final FY Budget.



5. Enter Fiscal Year 2015 for budget planning.
6. Enter Commitment Item
7. Click OK.

**Note:** The Funds Center will default based on your security access. Click Save As to save the variables entered as a Variant for quick access later.

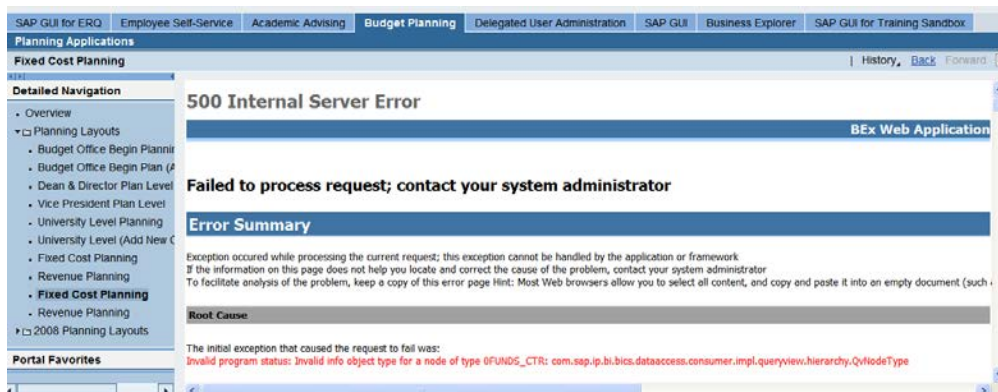
**Variable Entry**

Available Variants:  Save Save As... Delete [Show Variable Personalizer](#)

General Variables			
	Variable	Current Selection	Description
*	Fiscal Year	2015	2015
	Funds Center (Multiple Single Values, Auth	+NK	
	Commitment Item	+NK01550000(Text\ Node	Operating Pool-Opera

OK Check

**Note:** If you receive the following error, please see [Appendix A](#) of this document.



## Planning Layout

### 8. Change Button

**Note:** When you enter the Proposed Final FY 2015 Budget layout, before making any changes, click on the Change Button at the top of the layout. If the Change Button is not clicked first, you will be unable to make changes to the Commitment Items.

Proposed Final FY Budget

Plan Data Documents

Proposed Final FY Budget

Save Compute All Copy Version **Change** Display Refresh Export to Excel Print Version Turn Documents ON Upload File

Fund	Funds Center	Commitment Item	Functional area	Stat. key figures	Actuals FY/2013	Original Budget FY/2014	Base Adjustments	Proposed Fixed Cost Adjustments FY/2015
		550005 Supplies-Office	0100 Instruction	#	3,845.39	615.00		
		550015 Supplies-Education	0100 Instruction	#	732.67			

### 9. Close the Detailed Navigation panel to view your layout full screen.

Planning Applications

Budget Planning > Planning Applicat

2015 Planning Layouts

- Proposed Final FY Budget
- Compensation

No new rows or columns because

Proposed Final FY Budget

### 10. Click Compute All to populate the Proposed Budget FY 2015 Column for commitment items.

Proposed Final FY Budget

Save **Compute All** Copy Version Change Display Refresh

11. Enter Unit Admin Reallocation dollars for commitment items.

**Note:** Only fields that are “white” are available for data entry. Unit Administrators will use the Unit Admin Reallocation column. **The Unit Administration column should total zero. Commitment items can be added in manually to add budget to commitment item where budget did not previously exist.** Simply add Fund, Funds Center, Commitment item, and Functional area or use the search buttons.

550005	Supplies-Office	0100	Instruction	#	3,845.39	615.00		
550015	Supplies-Education	0100	Instruction	#	732.67			
550057	Tech Equip/Stwr<500	0100	Instruction	#	282.66			
550099	Procard Expense	0100	Instruction	#	0.00			
550205	Printing	0100	Instruction	#	2,838.17	1,615.00		
550305	Postage	0100	Instruction	#	237.64			
550505	Telephone-Long Dist	0100	Instruction	#	134.01			
550520	Meals & Refreshments	0100	Instruction	#	1,441.38			
550535	Subscrptns/Dept Bks	0100	Instruction	#	8,528.61			
550540	Dues/Cert Lic Fees	0100	Instruction	#	362.25			
550545	Accredit Fees Only	0100	Instruction	#	3,700.00			
550565	Staff Development	0100	Instruction	#	515.94			
550815	Recruitment Exp	0100	Instruction	#	6,049.91			
550825	Awards-Noncash	0100	Instruction	#	74.00			
550835	Visitor Park Pass	0100	Instruction	#	102.00			
550895	Overhead Fee Assmt	0100	Instruction	#	441.32	400.00		
550914	Emp Travel-Domestic	0100	Instruction	#	3,462.24	1,364.00		
550930	Ed/Train/Reg/Fees	0100	Instruction	#	1,831.99			

12. Control buttons are available at the top of the planning layout: Save, Compute All, Export to Excel, and Print Version.

13. Page navigation is available at the top of the planning layout.

**Proposed Final FY Budget**

Save
Compute All
Copy Version
Change
Display
Refresh
Export to Excel
Print Version
[Upload File](#)

You can continue to access the Unit Reallocation Planning layout until the “window” has been closed by the Budget Office. Please contact Angela Schaffer in the Budget Office for help, extension 6398. Email is [schaffera@nku.edu](mailto:schaffera@nku.edu).

[Appendix A](#)

The error message is the result of the security access crossing several 'nodes' or departments. For example, the user may be the person responsible for Building Trades and Building Services; but only one department can be accessed at a time. Follow the directions below to plan the budget for each department.

1. Click multiple selections for Funds Center.

**Proposed Final FY Budget**

**Variable Entry**

Available Variants:  Save Save As... Delete [Show Variable Personalization](#)

General Variables		
Variable	Current Selection	Description
* Fiscal Year	2013	
Funds Center (Multiple Single Values, Auth)	+NK01/0705(0FUNDS_CTR)	Off.of Comptroller

OK Check

2. Expand the Funds Center Hierarchy until you find the node you want.
3. Select the appropriate node.
4. Click Add.

**Select values for Funds Center (Multiple Single Values, Auth) (ZFI\_FUNDS\_CTR\_V01)**

Show view: All

Search:  Go Clear

- Off.of Comptroller
  - Off.of Comptroller
  - Comptroller
  - Accounts Payable**
  - Bursar Operations

Add Remove

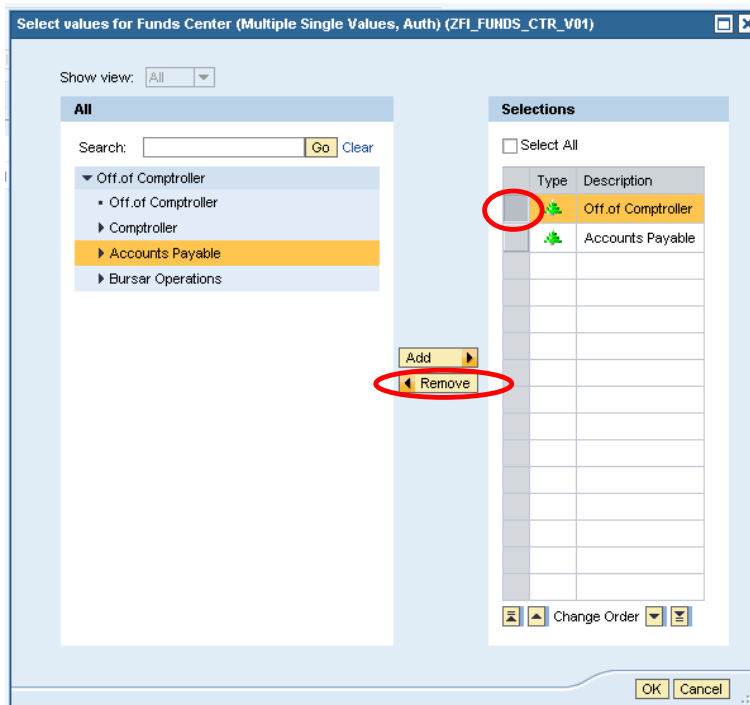
Select All

Type	Description
+	Off.of Comptroller

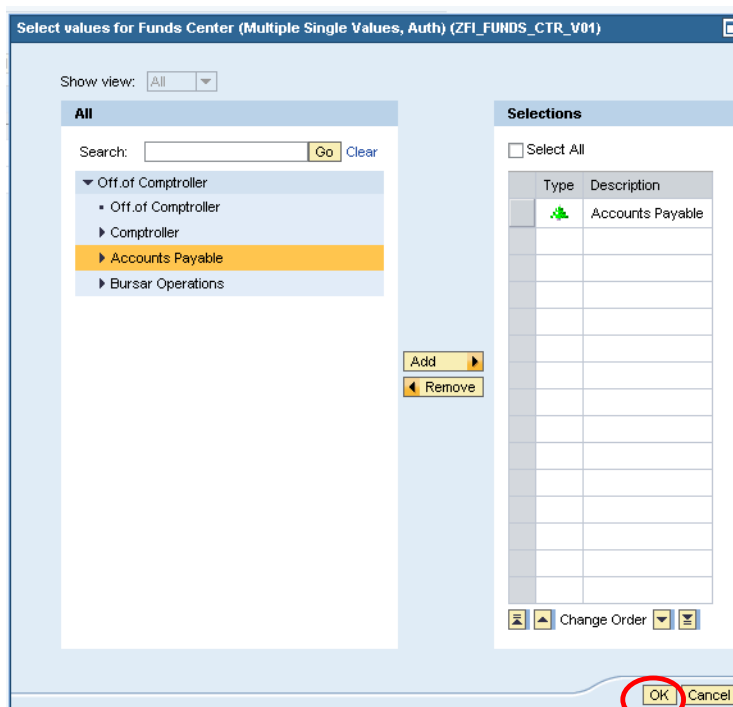
Change Order

OK Cancel

5. Select the Funds Center Hierarchy to remove.
6. Click Remove.



7. Click OK.



8. Continue with [page 3](#).