


## How to enter Summary personnel line items

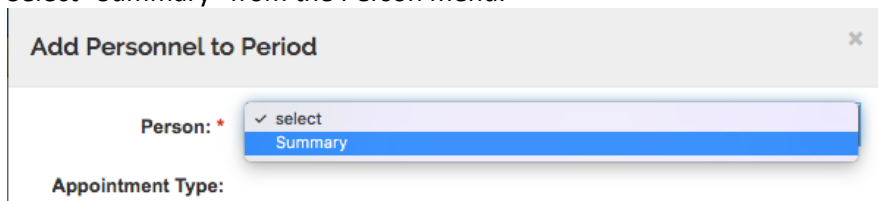
Budget personnel can be entered (1) in detail by person (preferred) or (2) as summary line items.

You cannot combine the two approaches for any one budget category (e.g., faculty salaries). Doing so will cause an error.

 Summary budgets cannot be created when individuals have already been budgeted for a given object code name / group / date range combination.

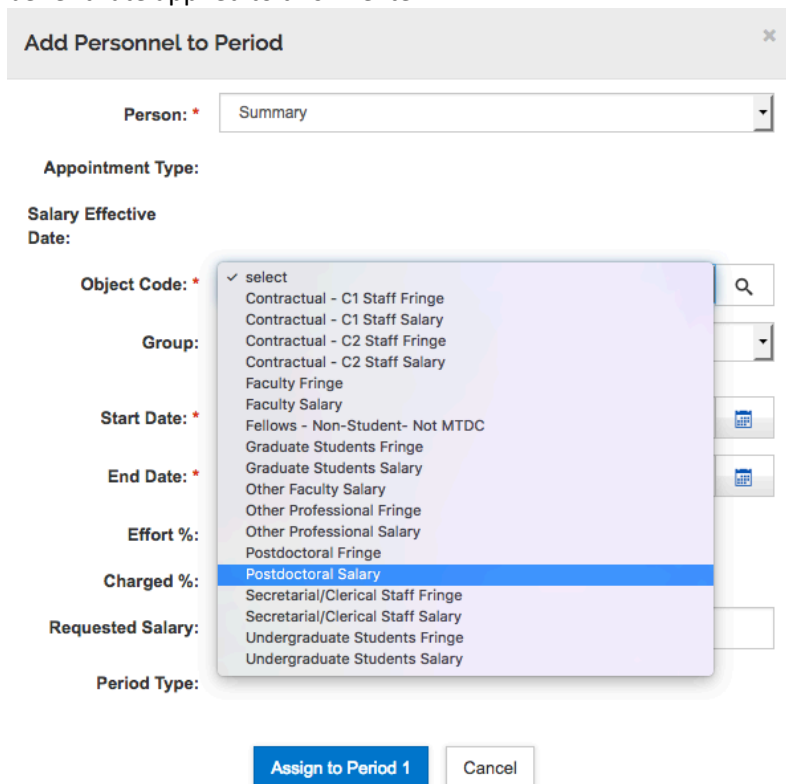
To enter personnel as a summary line item, in the Budget, go to the “Assign Personnel to Periods” section. Click Assign Personnel.

Select “Summary” from the Person menu.



The screenshot shows a dialog box titled "Add Personnel to Period". The "Person:" field is a dropdown menu with "select" at the top and "Summary" selected below it. The "Appointment Type:" field is empty.

Select the correct Object Code. Select one of the Salary object codes. This selection drives the fringe benefit rate applied to this line item.



The screenshot shows the "Add Personnel to Period" dialog box with the "Object Code:" dropdown menu open. The "Person:" field is set to "Summary". The "Appointment Type:" field is empty. The "Salary Effective Date:" field is empty. The "Object Code:" dropdown menu is open, showing a list of options: "select", "Contractual - C1 Staff Fringe", "Contractual - C1 Staff Salary", "Contractual - C2 Staff Fringe", "Contractual - C2 Staff Salary", "Faculty Fringe", "Faculty Salary", "Fellows - Non-Student- Not MTDC", "Graduate Students Fringe", "Graduate Students Salary", "Other Faculty Salary", "Other Professional Fringe", "Other Professional Salary", "Postdoctoral Fringe", "Postdoctoral Salary", "Secretarial/Clerical Staff Fringe", "Secretarial/Clerical Staff Salary", "Undergraduate Students Fringe", and "Undergraduate Students Salary". The "Postdoctoral Salary" option is selected. The "Requested Salary:" field is empty. The "Period Type:" field is empty. At the bottom, there are two buttons: "Assign to Period 1" and "Cancel".

Enter the Requested Salary. This will be an estimated amount for this budget category. Then, click “Assign to Period 1”.

**Add Personnel to Period** ✕

Person: \*

Appointment Type:

Salary Effective Date:

Object Code: \*

Group:

Start Date: \*

End Date: \*

Effort %:

Charged %:

Requested Salary:

Period Type:

Continue adding more categories as needed.

Note that the budget will not show any effort, FTE, or other detail for these line items. Thus, this approach cannot be used in situations when that detail must be provided.

The budget summary will show the categories, fringe benefits, and F&A.

### Budget Summary

	P1 (10/01/2018 - 09/30/2019)
<b>Personnel</b>	
▼ Salary	<b>\$250,000.00</b>
▶ Postdoctoral Salary	\$100,000.00
▶ Other Professional Salary	\$150,000.00
▼ Fringe	<b>\$78,600.00</b>
▶ Postdoctoral Salary	\$19,200.00
▶ Other Professional Salary	\$59,400.00
Calculated Direct Costs	<b>\$0.00</b>
Personnel Subtotal	<b>\$328,600.00</b>
<b>Non-personnel</b>	
Calculated Direct Costs	<b>\$0.00</b>
Non-personnel Subtotal	<b>\$0.00</b>
<b>Totals</b>	
Total Direct Cost	<b>\$328,600.00</b>