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About Labor Accounting
What is Labor Accounting?

Labor accounting is the systematic recording and maintenance of the charges incurred for the compensation or financial support of an individual. These charges or costs are distributed to one or more expense accounts (or project/grants) on an organization's general ledger or bookkeeping system.

The University's Labor Accounting system distributes the costs to project/grants for most regular employees’ normal compensation, such as regular 12-monthly salary, faculty 10-month academic year salary and summer salary, and biweekly employee salary. Other forms of employee compensation such as overtime, casual hourly wages, and severance pay are not distributed by Labor Accounting. The accounting information for these types of pay are entered on Time Collection or by Payroll directly.

The Labor Accounting system also distributes the costs for graduate student support such as fellowship stipends, assistantship salaries for instruction and research, and tuition support. Undergraduate and graduate student hourly wages are not distributed by this application. Project/grants for student wages are entered through Time Collection.

For employees, Labor Accounting does not affect the amount or type of a person's pay; that is controlled by the Payroll system. The Labor Accounting system takes what has been paid by Payroll and divides the cost among the project/grants (P/Gs) which have been designated as the source of funding for the salary in that pay period. The designation to fund a salary is called a commitment.

Note: A commitment determines the amount to be paid. A distribution establishes where the amount paid is charged.

For graduate student support, the Labor Accounting application can be used to establish the amount and type of support given to a student. Support commitments are entered on Labor Accounting for summer and academic year support. Once a month, a transfer is made of the appropriate monthly amounts and support types from Labor Accounting to Payroll. All taxes and deductions are calculated and accounted for in Payroll. When the support is paid at the end of the month, the Labor Accounting system takes what has been paid by Payroll, and divides the cost among the project/grants that have been designated as the source of funding for an individual’s financial aid.
What’s New?

The Labor Accounting application has been completely rewritten to include the following new features:

✧ Security

- Access to Labor Accounting data is now controlled based on a combination of home department, project/grant, and staff class. Access can be granted for a whole department, or restricted by project/grant or staff class. This allows staff to be granted access to a single project/grant, or a range of project/grants.
- Three access levels have been added to allow staff to maintain Labor Accounting commitment and encumbrance data directly for their projects:
  - Project Approval access allows a staff member to approve changes to a specific project/grant or set of project/grants.
  - Project Input access allows a staff member to enter changes to a specific project/grant or set of project/grants.
  - Project Inquiry access allows a staff member to view commitments and encumbrances for a specific project/grant or set of project/grants.

✧ Data entry and workflow

- Both departments and projects can enter and approve Labor Accounting commitment distributions at the project level. This will allow academic centers, institutes, and programs that staff their projects with resources based in other departments to enter changes involving their own projects directly. If necessary, workflow will route the pending change to the appropriate home department for review and approval.

Conversely, if a home department enters a change to a project not owned by the department, workflow will route the pending change to the project for review and approval. This feature, along with the new project access levels, will allow non-home areas to make pending adjustments without having to go through the home department.
Where it is appropriate for distributions to span academic terms or fiscal years, the system will not require the user to re-enter information. You will be able to specify begin and end dates for a distribution, rather than automatically ending all distributions at the end of a fiscal year. The system will be able to report distributions by fiscal year, by academic term, or by month.

Access is provided to a graduate student’s annual support contract information within Labor Accounting. As an aid to entering or updating annual salary, stipend, and tuition support commitment information for graduate students, you can reference and (optionally) copy stored support data into the pending support. When the department is supporting the student as the student’s contract documents specifies, rekeying of the contract information can be avoided. However, when the stored support data is not up-to-date, the stored contract data can be used as a starting point for updating the support. If desired, you can simply reference the contract comment while keying in support data.

Additionally, multiple predefined, standard support configurations (templates) can be used to quickly establish often-used support and standard rates.

Data for staff or graduate students who transfer between departments can be maintained separately by each department. Access to Labor Accounting records for individuals who have transferred will be controlled by time period. Each department will maintain the records for that person in the time period when the person was assigned to that department.

Workflow routing for approval of specific changes will allow the owning department or project manager to review and approve or disapprove each change that is proposed and submitted before it goes into effect. Since all changes will be approved by the project owner or manager before becoming effective, any project/grant can be included in a proposed change, thus eliminating the need for exception accounts.

Key Labor accounting events will trigger email notifications to appropriate project, department, or central administrative staff members. For example, a notice will be sent telling the staff member that a change has been made that requires their approval.
In addition, periodic queries of Labor Accounting data will look for key dates or predetermined combinations of data, and will trigger email notifications to alert department and project staff that commitments exist on recently closed project/grants, or that a milestone has been reached.

- An audit trail will record when changes were submitted, approved, or automatically updated by the system, and who submitted and approved the changes. The audit trail data can be queried, reported, and sorted to provide better information and analysis.

❖ **Updates and Interfaces**

- Information gathered by the Coeus grant proposal process will be made available to the Labor Accounting system. A list of the individuals included in the awarded grant proposal will be available for reference at the time a project is entering Labor Accounting distributions.

If the salary of an individual was previously shared with the non-home project during the proposal process, the current salary amount will be available to the project prior to department approval. Salaries for individuals not listed on the proposal will not be displayed to the project Labor Accounting user until after the home department approves the commitment. Until that time, the project will only enter percentages of Full Time Equivalent (FTE) salary for the individual.

- The Teaching Budget will be available to all academic departments online. The Labor Accounting Teaching Budget Report will include better comparisons between authorized department FTE levels and actual commitment levels.

❖ **Summer Salaries**

Requests to pay faculty summer salaries and the related salary commitments can be entered directly into the Labor Accounting system. At any point during the year prior to the summer period (up to 12 months prior), a department or project can enter and approve faculty summer commitments to projects. Workflow will route the proposed payments for the appropriate approvals. This will generate salary encumbrances on the project which will be displayed on the financial statements for more complete project staffing and salary cost forecasts.
The department/project approved commitments will also be approved by the Office of the Dean of the Faculty (typically in May or June prior to payment), before Payroll can pay the faculty member. The Labor Accounting system will edit for salary limits under the current policy. Before the July and August payrolls, Labor Accounting will send the appropriate monthly payments to the Payroll system. Any approved retroactive payments will be sent to Payroll in subsequent months.

**Distributions**

- Each department can specify default project/grants by Staff Code and Earnings Code, so that distributions are automatically designated to the correct project/grant, thus eliminating some unnecessary data entry. With the distributions defaulting to various appropriate project/grants, some administrative departments would not need to update Labor Accounting unless special circumstances required a distribution to a non-default project/grant.

  The default project/grants would also be used in distributing payroll charges that are not committed and for which no specific project/grant has been specified by the department. If a project has “purchased” time related to an individual’s work on the project, the department default would be credited and the project’s project/grant would be charged. This would allow Labor Accounting to process any payroll charge sent by Payroll, and eliminate errors which can hold up the payroll charge distribution process or require the use of the suspense project/grant.

- Distributions for temporary disability will be automatically charged to the appropriate project/grant. For the first 30 days, the temporary disability will continue on the project/grant distribution for regular salary (earnings 001), eliminating the initial charge to nnn1998. For staff in academic departments, after 30 days, the commitment distribution will automatically be transferred to the Benefits Pool. After 180 days, the temporary disability commitments will be transferred back to the original project/grant for the department or project, since temporary disability is only available for up to 180 days.
The Labor Accounting system is linked to several other University systems.

The following systems receive data from or send data to the Labor Accounting system:

- PeopleSoft HR
- PeopleSoft SA
- PeopleSoft Payroll
- PeopleSoft University Financials System
- Graduate Student Admissions
- Loans and Receivables/Princeton Receivables
- Operating Expense Budget

These systems are briefly described in the following sections.

**PeopleSoft HR**

All individuals in the Labor Accounting system must first have records established in the Human Resource Management System (HRMS) database. This establishes the type of employment (full or part time), the staff type (faculty, visiting researcher, biweekly A, etc.), the pay schedule (12 or 10 months, 26 biweekly pays), and in the case of non-students, the level of compensation (FTE salary). Other status information such as leaves with or without pay are also entered in the Human Resource Management system. As changes are made to an employee's or student's status, nightly downloads keep the Labor Accounting database synchronized with the appropriate data in the Human Resource Management system. These changes cannot be made using the Labor Accounting system.

Each person paid or supported by the University is assigned a University identification (EmplID) number, which never changes once it is established. The EmplID number links a person’s data in various systems even if their name or social security number changes. The PeopleSoft HR system provides Labor Accounting with each person’s data.
**PeopleSoft Student Administration**

Enrollment status changes in the PeopleSoft Student Administration system for graduate students will be displayed in Labor Accounting. If the status matches what you know, you can match the enrollment events in Labor Accounting to the Student Administration enrollment status. If you know about a change before it is captured in the Student Administration system, you can enter the changes in Labor Accounting, and adjust your commitments accordingly, without waiting for the Student Administration system to catch up.

Data about graduate student contracts is also captured from the Student Administration Graduate Re-Enrollment system.

**PeopleSoft Payroll System**

Each pay day, the amount that was paid to every individual and the earnings type for each amount are downloaded from Payroll to the Labor Accounting database. Journal voucher entries are generated based on the salary and support distributions stored in Labor Accounting. These journal vouchers are then used as input to University Financials, the University's general ledger system.

Before each monthly payroll, Labor Accounting uploads the amount and type of support for each graduate student based on the commitment levels established and stored in the Labor Accounting database.

**PeopleSoft University Financials System**

On each payday, the journal vouchers generated by Labor Accounting are uploaded to the PeopleSoft University Financials System (UFS). These journal voucher transactions appear as charges on the Project/Grant Statement (PGS) in the DataWarehouse, and are summarized in the Sponsored Project Report (SPR). These reports are also available monthly as hard copy reports. The charges are summarized by P/G, so no individual salaries or graduate support amounts are displayed on UFS.
When changes are made to commitment distributions retroactively, these changes affect amounts already charged and paid. After each payroll, the Labor Accounting system compares the amounts that were originally charged to the project/grant to the amounts currently authorized. Any differences that are found generate journal voucher entries for retroactive adjustments. These entries deduct year-to-date charges from the original project/grant charged, and add charges to the project/grant now authorized to receive the charges. These journal voucher entries are uploaded to the UFS, and appear on the Project/Grant Statement and Sponsored Project Report.

Starting July 1st, 2003, salary encumbrances and graduate support commitments will be uploaded nightly to the Data Mall, where they will be available for viewing online or for creating PGS and SPR reports.

**Operating Expense Budget System**

The Labor Accounting database supplies budget amounts to the Operating Expense Budget system for annual salaries and graduate support. Once a year, after all new salaries and support amounts have been established, budget amounts that are charged to general funds (1.xxx project/grants) are uploaded to the Budget system. These amounts, along with non-salary budget amounts, form the basis for the Total Spending Authority appearing in online panels and all reports for any general fund project/grant.

**Loans and Receivables/Princeton Receivables**

The Princeton Receivables/Loans & Receivables system bills donors who sponsor graduate students. Labor Accounting drop-down lists are populated based on the donors entered in the Princeton Receivables/Loans & Receivables system. If the Sponsor drop-down list does not include the donor you need, contact the Loans & Receivables Office to add the donor.
Graduate Student Contracts

In June of every year, contract information from the PeopleSoft Student Administration Graduate Re-Enrollment system is loaded into the Labor Accounting Comments page for newly admitted and re-admitted graduate students. You can load the contract information from the Comments into pending data, by clicking the Load Contract button on the Graduate Student Support Summary page. You can then update the information as needed.

Based on the current date, the contract data is loaded into either the budget year or the current year.

**Tip!** Loading contract information into pending data overwrites any data that was already there. If the data is completely incorrect, you can always quit without saving to return to the last saved data.
Security and Authorization

The Labor Accounting application uses security features that control your access to people’s data. Your Department Chair or Head specifies whose data you may access, generally restricting your access to people in your own department. You might also be restricted to a specific staff class such as faculty or graduate students, or a particular project/grant or set of project/grants. These access restrictions are recorded in your Labor Accounting security profile. If you try to select personnel for whom you are not authorized, the system will not process the selection, and an error message will appear. If you assign a project/grant for which you are not authorized, the person who is authorized for that project/grant will be notified that the distribution requires their approval.

The information in your security profile also tells the system what level of tasks you may perform in the Labor Accounting application. Access levels are described in the following table.

Table 1: Security Access Levels

<table>
<thead>
<tr>
<th>Access level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Inquiry</td>
<td>You may see but not change project/grant distributions for authorized project/grants in Labor Accounting.</td>
</tr>
<tr>
<td>Department Inquiry</td>
<td>You may see but not change commitment and encumbrance data for authorized departments in Labor Accounting.</td>
</tr>
<tr>
<td>Project Input</td>
<td>You may enter and maintain commitment and encumbrance data for authorized project/grants in Labor Accounting.</td>
</tr>
<tr>
<td>Department Input</td>
<td>You may enter and maintain commitment and encumbrance data for authorized departments in Labor Accounting.</td>
</tr>
<tr>
<td>Project Approval</td>
<td>You may approve commitment and encumbrance data for authorized project/grants in Labor Accounting.</td>
</tr>
<tr>
<td>Department Approval</td>
<td>You may approve commitment and encumbrance data for authorized departments in Labor Accounting. All changes must be authorized at the department level.</td>
</tr>
<tr>
<td>Central Office Approval</td>
<td>You may approve commitment and encumbrance data at the central office level. Changes to faculty members and graduate students must be authorized at this level.</td>
</tr>
</tbody>
</table>
Your Labor Accounting security profile may restrict you to viewing labor accounting information at the first level, or you may be authorized to make changes for specific project/grants, or for your department. If you work in the Office of the Dean of the Faculty or the Graduate School Office, you might have access that allows you to approve changes at the University central office level.

**Important!** Labor Accounting data is sensitive data. Never walk away from your computer with Labor Accounting data visible or easily accessible. Use password security on your screen saver, or lock the screen when you must leave your desk.

Your security profile is established with your Labor Accounting ID, based on the security restrictions specified by your Department Chair or Head. See “User Identification,” on page 19 for information on getting a Labor Accounting ID.
The Distribution Cycle

The distribution of salary and graduate support commitments is based on the University's fiscal year. In Labor Accounting, you can edit any of three fiscal years: the most recent past year, the current year, and the up-coming budget year. You can also see, but not edit, the year before the most recent past year.

The amounts for graduate support need to be authorized by the Graduate School office, generally by the third week in each month, so Payroll will have time to edit the taxes and make any year-to-date adjustments. Some months, such as December and June, are on an accelerated schedule since the monthly pay day is the 20th in those months. (The Payroll section of Finance can provide you with an annual schedule, which lists when changes are due in Payroll for each month.)

**Tip!** You can also find this schedule on the PeopleSoft 8 Documentation and Help web site (http://www.princeton.edu/pshelp) by selecting Human Resources Management System (HRMS), and then clicking on the Pay Schedules link.
The Application

The Labor Accounting application is designed to provide access through the web (at work or at home) to the information stored in the Labor Accounting database. It allows you to view and maintain the current distributed salary and graduate support commitments and encumbrances by individual and fiscal year.

**Important!** Labor Accounting data is sensitive data. Never walk away from your computer with Labor Accounting data visible or easily accessible. Use password security on your screen saver, or lock the screen when you must leave your desk.

Because Labor Accounting is a web-based application that works through your browser, a Labor Accounting session remains active if you navigate away from Labor Accounting in the same browser window. Because your session remains active until you return to Labor Accounting or time out, you should make a practice of opening a separate browser window if you need to check out another web site and then return to Labor Accounting.

Also, as with most browser-based applications, you should not use the browser’s Back and Forward buttons within the application. You may be able to return to the page, but the connection to the application may have been lost, which could cause errors when you try to edit the page.

**Parameters Used to Determine the Current View**

When you work in the Labor Accounting application, you work with a subset of people in the complete personnel roster, called your **current view**. The current view includes the people that you need to review or update, and is based on selections you make on the General Browse or Project Browse page. From the current view, you select one person at a time, and use the other pages to review their data and implement changes. You can select another individual or change your selection criteria to create a new current view at any time during a session.

The selection criteria used to create your current view may include project/grant, department, staff, status, commitment code, and fiscal year or date range. You may also search for vacancies only.
**Fiscal Year or Date Range**

You must select the desired fiscal year because the application maintains data for the prior year, the current year, and for the next year’s budget. You can review and update data for any of the three years.

**Pending Status**

You can include staff with any status in Labor Accounting, or you can select only the staff who have changes pending departmental authorization, or central office approval.

This search criteria is available only on the General Browse page.

**Name & Emplid**

You can select an individual, or a group of individuals whose name begins with the same letter(s) by entering all or part of the person’s Last and First names, or entering the person’s EmplID.

**Department**

You are generally restricted to your own department. However, if you are authorized to view more than one department, you can select any of those departments to create the current view. If you don’t enter a department number, all departments you are authorized to see will be included in the search.

Those with university approval authorization (Dean of Faculty Authorization or Graduate School Authorization) can create a current view that includes faculty or graduate students from all departments. To search a group of departments, or a subset not related to a department, select a division in the Div field.

This search criteria is available only on the General Browse page.

**Staff**

You can include all the staff you are authorized to see in your department in your current view (the default), or you can display only a desired subset, for example, only graduate students, or only technical staff. You can also search staff classes by code, thus limiting your search to graduate exchange students or biweekly staff, for example.

This search criteria is available only on the General Browse page.
Chapter 1: About Labor Accounting

Commitment Code

You can include only the staff with a particular commitment code, such as staff with summer salary commitments, or graduate students with a salary commitment for assistance in instruction (AI) for the academic year.

This search criteria is available only on the General Browse page.

Project/Grant

You can include only the staff with distributions for a particular project/grant, a range of project/grants, or all project/grants. You can also search by Primary Investigator or fund, or include only sponsored projects in a particular department.

Special

You can search for only the vacancies within any other specified criteria, for example, vacancies within your department.
Getting Started
System Access Requirements

The Labor Accounting system is a web-based application. To use Labor Accounting, you must have access to the internet through a browser application, such as Internet Explorer. You must also be identified in the system as an authorized user.

The Labor Accounting system operates on a central University server where all the Labor Accounting information is processed and stored. This way, authorized users can access the same information at the same time from any location, and any updates will be immediately accessible.

Software Requirements

To access Labor Accounting you will need Web access and a browser:

- Internet Explorer (Windows)
- Firefox (Windows, Linux, and Macintosh)
- Safari (Macintosh)

In addition, JavaScript must be enabled in your browser settings, and pop ups must not be disabled.

To see the Labor Accounting pages and windows in full, the optimum resolution for your monitor is 1280 x 1064. However, the lower resolution of 1024 x 768 will work; it will just require you to scroll down to see the buttons at the bottom of the Summary pages. You can check the resolution of your monitor (and change it, if necessary) by right clicking on the desktop, and selecting Properties from the shortcut menu. Click on the last tab, Settings, to display the current resolution.

**Tip!** You can get to the same Properties dialog box from the Start menu by selecting Settings, Control Panel and then Display.
**User Identification**

In order to use the labor accounting application, you must have access to the database server. Access to the database server and the labor accounting application is controlled through your LDAP user ID and password (your LDAP ID is the one you use for standard (IMAP or Exchange) e-mail and Webmail, or to sign onto PeopleSoft, and is often referred to as your Net ID). Your user ID also controls whether you can view or update personnel records, and which departments and project/grants you can display or approve.

You can obtain a request form to access Labor Accounting, or to change your current access, by going to the PS Financial Systems Business Operations Group web page at: [http://www.princeton.edu/ufinsi](http://www.princeton.edu/ufinsi) and selecting **All Treasurer's Forms** from the side menu. Print the form, complete and sign it, and send it to the address on the form. If you prefer, you may fax the completed form to 258-1982.

If you have any comments, questions, or revisions to the form you may contact the Security Administrator identified on the Operations Group web page.
Starting Labor Accounting

You start Labor Accounting by going to the Labor Accounting Welcome page and clicking the Login option. The Welcome page also provides information on scheduled outages, Labor Accounting news, deadlines, and so on.

On the Login page, you must enter your Net ID and password. Without this password, the system will not allow you to access Labor Accounting.

After you enter the application, you must select a subset of people from the database as a starting point. Special security features restrict your access according to established update and view authorizations.

To start Labor Accounting:

1. Open your internet browser (Internet Explorer v. 5.5 or higher is the preferred browser for PCs).
2. From the Princeton home page, navigate to the Labor Accounting Welcome page:
   a) Click on the Administration & Services link in the menu on the left.
   b) On the Administration & Services: Overview page, click on the Business Systems link in the menu on the left.
   c) Scroll down, if necessary, and click on Labor Accounting in the Other Business Resources area.

   Alternatively, you can type www.princeton.edu/laboraccounting in the Address bar and press the Enter key or click the Go button.

   **Tip!** The Labor Accounting Departmental Reports are available in the Data Warehouse.

3. When the Welcome page is displayed, click on the Log In link to display the Labor Accounting Login page.
4. Type your net ID (also known as your LDAP user ID) in the Net ID field.
5. Press the Tab key, or click in the Email Password field and type your LDAP password.

**Note:** This field is case sensitive. For example, the value Ab45XzY is not the same as ab45xzy or AB45XZY.

6. Press Tab and then Enter, or click on the Log In button. A blank General Browse or Project Browse page is displayed, with the Search Criteria fields set to blank or ------All------.

**Note:** If you have only project authorization, the Project Browse page is displayed. Otherwise, the General Browse page is displayed.

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**Changing Your User Profile**

Your user profile controls your default settings for

- which years are expanded on the Summary pages,
- whether the work list is shown on the General Browse page, and
- whether or not you want to receive email notification when a change requires your approval.

You can access your user profile from the Login page, by clicking the User Profile link.

**To edit default settings in your user profile:**

1. On the Login page, enter your Net ID in the Net ID field.
2. Enter your LDAP password in the Email Password field. This field is case sensitive, so be sure that Caps Lock is not on.
3. Click the User Profile link to display the Edit Default Settings page.
4. To show the data for the prior year when the Summary page is opened, select ( ) the Expand prior year checkbox.

**Tip!** On the Graduate Student Support Summary page, the internal support lines are expanded. On the Faculty & Staff Commitment Summary, the Commitment lines are expanded.
5. To show data for the current year when the Summary page is opened, select (✔) the *Expand current year* checkbox. *Expand current year* is the default the first time you sign onto Labor Accounting.

6. To show the data for the budget year (next year) when the Summary page is opened, select (✔) the *Expand budget year* checkbox.

7. To use the General Browse page as your Labor Accounting worklist, select (✔) the *Show work list in browse page* checkbox. This will set the General Browse search criteria to include the **All Approvals Pending Status**.

8. To receive email notification when a change requires your approval, select (✔) the *Receive email notification* checkbox. This is selected by default the first time you sign onto Labor Accounting.

   **Note:** If you turn email notification off, you will still receive email notification for any pending changes that have been awaiting approval for 14 or 21 days.

9. Click the **Save** button to save the new profile settings and login to Labor Accounting. The General Browse page is displayed.

   **Tip!** *Clicking the Cancel button will still log you in to Labor Accounting, but without making any changes to your user profile.*
Exiting Labor Accounting

To exit from Labor Accounting, click the Log Out button on either the General Browse or the Project Browse page. If you have made changes to an individual’s data and you want the changes saved, be sure to save or submit the changes before you exit Labor Accounting.

**Note:** If you close the browser while you are on a detail page, such as the Asst Instr page for graduate students or the Regular Pay (REG) page for faculty or staff members, any changes entered on that page will be lost. You must return to the Summary page and save or submit changes before closing the browser if you do not want to lose the changes.

To exit from Labor Accounting:

1. Save or submit your changes, or quit editing to abandon your changes. This returns you to the General Browse or Project Browse page.

2. Click the Log Out button.

3. Close the browser window.

**Session Security Measures**

Because Labor Accounting is a web-based application that works through your browser, a Labor Accounting session remains active until you log out or close the browser window, even if you navigate away from Labor Accounting in the browser window. If you log out and navigate away in the same browser window, any Labor Accounting data in your cache remains available for display, although no one would be able to actually make changes, or navigate to a page that you did not access during your session.

Because your session remains active if you navigate away without logging out, you should make a practice of opening a separate browser window if you need to check out another web site and then return to Labor Accounting. This will help you to remember that your Labor Accounting session is still active. You should always log out of Labor Accounting when you complete your work.
To provide security, the application will time out after **30 minutes** of inactivity, and any changes that have not been saved or submitted will be lost. Only actions that communicate with the database are considered activity. Therefore, clicking a tab or a button is considered activity, but typing on a page is not. If you are called away from your work, you should save your changes before leaving.

**Important!** Labor Accounting data is sensitive data. Never walk away from your computer with Labor Accounting data visible or easily accessible. Use password security on your screen saver, or lock the screen when you must leave your desk.
Using Browse Pages to Locate Personnel
Locating Personnel on the General Browse Page

The General Browse page is used to locate personnel records that you want to review or change. This page is available if you have department access or higher.

Note: If you have only project/grant access, you must use the Project Browse page to locate personnel records that you want to review or change for your projects. See “Locating Personnel on the Project Browse Page,” on page 143 for more information on the Project Browse page.

The General Browse page consists of two parts:

✦ The Search Criteria panel, where you enter the criteria used to select the personnel that will be displayed in the personnel list.

✦ The personnel list, which shows all personnel that match the search criteria you entered (your current view), and includes the buttons at the far right that you will use to display either the Summary page for editing, or the Summary Report for viewing without making changes.

Using the search criteria, you can narrow the current view down to a single person, or you can expand it to include people from multiple departments and staff classes if you are so authorized.

At the bottom of the General Browse page are the following buttons:

- The Add Vacancy button you can click to add a commitment for a vacant position, reserving the funds for an eventual hire.

- The Add Template button you can click to add a template for standard or commonly used distributions in your department.

- The Project Browse button you can click to display the Project Browse page, where you can display a project summary for any project for which you are authorized.

- The Log Out button you can use to log out of Labor Accounting.
Each time you start Labor Accounting, the General Browse page is displayed with a blank personnel list, unless you have selected the worklist option in your user profile (see “Changing Your User Profile,” on page 21 for more information). To list the personnel you want to review or edit, you will need to enter the criteria that define which records you are interested in (your current view).

When you have created your current view, you can select the people for whom you need to make changes or review distributions from the personnel list on the General Browse page. When you edit a record, the record is locked to anyone else until you close the record, either by quitting the edit or by submitting the changes for approval.

When you finish reviewing the selected person’s records, you may return to the General Browse page to select the next person. To return to the General Browse page, click one of the following buttons at the bottom of the Summary page:

- **Quit Edit** to return without saving or submitting any changes you may have made. If you have made changes, they will not be saved.
- **Save** to save your changes without submitting them for approval. The record remains locked to other users, and the changes are held for 24 hours. If you have not returned to the record to update or submit your changes, after 24 hours the record is unlocked, and any other authorized person can make changes to the record.

  After 24 hours have passed, if you return to the record and no one else has opened or changed the record, your changes will still be there. However, if someone else has opened and edited the record, your changes may be lost.

- **Submit** to save your changes, approve changes for all of your authorized approval levels, and submit them for any other required approvals.
- **Partial** to approve changes at your highest authorized approval level only. For example, if you have departmental and project approval authorization, partial approval approves changes at the department level only.
- **Disappr** to disapprove changes.
Chapter 3: Using Browse Pages to Locate Personnel

**Entering Search Criteria to Create the Current View**

You can select the parameters to create a current view at the beginning of your Labor Accounting session, and you can change these parameters at any time during the session. All search criteria you select will be used together to determine which records will be listed in the current view.

If you have changed one or more search criteria and then, before clicking the Search button, you decide you want to return to the previously used criteria rather than using the changed criteria, click the Reset button. To return all the search criteria to the default settings, click the Clear button.

To display a help topic that introduces or explains the displayed page, click the Help button. This button appears on most pages. If you need more help than is provided in the help topic, click the Contents button at the top of the topic page to display the help navigation pane, which you can use to locate more information.

**To create a current view:**

1. On the General Browse page, select the Fiscal Year or Date Range for which you want to list people:
   - To select one or more years, click on the checkbox before (to the left of) each year you want to include. Only individuals who are active in Labor Accounting (have distributions) during the selected year(s) will be displayed on the General Browse page.

   **Tip!** Fiscal years are known by the ending year, so the 05-06 year would be known as fiscal year 2006.

   - To select a date range, enter the beginning date in the From field and the ending date in the To field, in M/D/YYYY format (where $M$ is the one or two digit month number, $D$ is the one or two digit day of the month, and $YYYY$ is the four digit year).

   **Tip!** You can double click in the From and To fields to display a calendar where you can select the desired date. See “Using the Calendar Window,” on page 171 if you need help using the calendar.
Only individuals who have distributions during the selected period will be displayed on the General Browse page.

**Note:** The Summary page will include data for all fiscal years stored in the Labor Accounting database for the individual.

2. To limit your selections to a single pending status, select the desired status from the drop-down list in the *Pending Status* field. The code before the status description is the same code that is displayed in the *Pend Code* column on the personnel list.

**Note:** If you do not have authority for a person, they will not show up in the General Browse page, even if the criteria you enter are otherwise correct. Use the Project Browse page to locate a person who is not in your authorized department(s).

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>P - Basic Approval</strong></td>
<td>Only records with changes that have been waiting for department or project approval will be displayed.</td>
</tr>
<tr>
<td><strong>C - CO Approval</strong></td>
<td>Only records with commitment changes that have been authorized by a department and/or project, but have not yet been approved by the appropriate central office (Graduate School for graduate students, Office of the Dean of the Faculty for faculty, HR or PPL for staff) will be displayed.</td>
</tr>
<tr>
<td>All Approvals</td>
<td>All records that are pending any type of approval for which you are authorized will be displayed. This option displays your worklist.</td>
</tr>
<tr>
<td><strong>U - Approval (others)</strong></td>
<td>All records that are not waiting for your approval, but are still waiting for approval by other people will be displayed.</td>
</tr>
<tr>
<td><strong>UC - CO Approval (oth)</strong></td>
<td>All records that have been approved at the department and project level, but are still waiting for approval by the central office will be displayed.</td>
</tr>
<tr>
<td><strong>UX - Disapprove (oth)</strong></td>
<td>Only records that have changes that have been disapproved and must be corrected before someone else can approve them will be displayed.</td>
</tr>
</tbody>
</table>
3. To select records by name or ID, enter values in the Name & Emplid area:

- To limit your view to one or more people whose names begin with the same letters, enter as much of the last name as you know in the Last field, and as much of the first name as you know in the First field.
- To limit your view to a single person, enter the person’s Employee ID (their PeopleSoft EmplID) in the ID field.

4. To select records for only one department, enter the three-digit department code in the Dept. field. To select records from a group of departments, select a division from the drop-down list in the Div field.

   **Note:** If you only have access to one department, you can leave the Dept field blank. All records in your department that meet any other criteria you have selected will be displayed.

5. To limit your current view to a particular staff class, select the staff class you want to include from the drop-down list in the Class field. The following staff classes may be listed:

- **ADMIN** Administrative and monthly pay period staff
- **BW-A** Biweekly-A staff (service and maintenance, and technical support)
- **BW-B** Biweekly-B staff (administrative)
- **CAS** Casual hourly employees
- **FAC** Regular and visiting faculty members
- **GS** Graduate students
- **LIBR** Professional Librarians
- **MISC** Any employee not in one of the other classes
To further restrict the staff class, select a category from the drop-down list in the Code field.

**Tip!** The Code field includes both the staff code and the description. Be sure that you are selecting the correct combination. For example, Administrative appears on the list twice, once with the AM code and once with the MR code.

6. To limit your current view to a specific commitment code, such as 002 Summer Salary, 103 Academic Year AI Salary, or 041 Temporary Disability, select the code from the drop-down list in the Commitment Code field.

7. To limit your current view to one or more project/grants, you may select by project/grant, by department, by primary investigator, or by fund. You can also limit your selections to only sponsored projects.

   - To include a range of project/grants, enter the first project/grant number in the Begin field and the last project/grant number in the End field. You may enter all or part of the project/grant number in either field.
   - To limit your view to a single project/grant, enter the complete 7-digit project/grant number in the Begin field.
   - To include all project/grants in a particular department, enter the 3-digit department code in the Dept field.
   - To limit your view to sponsored projects within the specified (or default) department only, click the Sponsored Project checkbox.
   - To limit your view to projects lead by a specific primary investigator, select the investigator from the drop-down list in the P.I. field.
   - To include all project/grants under a particular fund in the specified or default department, select the fund from the drop-down list in the Fund field.
8. To limit your current view to special groups of records within the other criteria you have entered, select the desired group from the *Special* field.

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clear Offset</strong></td>
<td>Displays only records with offset distributions. These must be resolved before changes can be approved.</td>
</tr>
<tr>
<td><strong>Closed P/G</strong></td>
<td>Displays only records with commitments for a project/grant after the close date of the project.</td>
</tr>
<tr>
<td><strong>Closed P/G - Book</strong></td>
<td>Displays records with future commitments in projects which have already closed.</td>
</tr>
<tr>
<td><strong>My Worklist</strong></td>
<td>Displays only your worklist. (Alternatively, select <strong>All Approvals</strong> from the <em>Pending Status</em> drop-down list.)</td>
</tr>
</tbody>
</table>

*Important!* Your worklist will not include people who are not in your department. If you must approve project distributions for such people, you must locate them using the *Project Browse page*.  

*Note:* If you have department authorization, your worklist includes records with a *Pending Status* of P or X. If you have central office authorization, your worklist includes records with a *Pending Status* of C.

| **New Contract - Day**      | Displays only graduate students whose contracts have been updated in PeopleSoft within the last day. |
| **New Contract - Week**     | Displays only graduate students whose contracts have been updated in PeopleSoft within the last week. |
| **New Contract - Since Last Change** | Displays only graduate students whose contracts have been updated in PeopleSoft more recently than their records in Labor Accounting. |
| **No I9**                   | Displays only graduate students with commitments who do not have an I-9 on file. |
| **No I9 Current Commit**    | Displays only graduate students with commitments beginning within one month who do not have an I-9 on file. |
Locating Personnel on the General Browse Page

9. When all selections are complete, click the Search button or press the Enter key. The General Browse page reappears, listing the people you have selected.

10. To view or change distributions, click the Edit Summary button on the row for the person whose distributions you want to change.

What's on the Personnel List?

The Personnel list on the General Browse page provides a quick summary of each person’s status. The list is initially displayed in order by department and name; however, you can sort the list based on any of the fields by clicking on the column header for the field you want to sort by. The records will be sorted in ascending order.

The personnel list includes the following information about each personnel record that matches your search criteria:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding Saves</td>
<td>Displays only the records that you have saved but not submitted.</td>
</tr>
<tr>
<td>Unmatched Enr Stat</td>
<td>Displays only graduate students whose enrollment status in Labor Accounting differs from their enrollment status in PeopleSoft.</td>
</tr>
<tr>
<td>Vacancies Only</td>
<td>Displays only the vacancies that match any other criteria entered.</td>
</tr>
<tr>
<td>Vacancies in Short Term</td>
<td>Displays only vacancies with commitments that begin within the next week.</td>
</tr>
<tr>
<td>Emplid</td>
<td>The person’s employee ID from their PeopleSoft record.</td>
</tr>
<tr>
<td>Job#</td>
<td>50 or 51 for graduate students and 0, 1, 2, and so on for faculty and staff members. The 0 record is usually the person’s primary job.</td>
</tr>
<tr>
<td>Name</td>
<td>The person’s name, last name first.</td>
</tr>
<tr>
<td>Staff Class</td>
<td>A code indicating the person’s staff classification.</td>
</tr>
<tr>
<td>Enr</td>
<td>For graduate students, the enrollment status code.</td>
</tr>
<tr>
<td>Home Department</td>
<td>The 3-digit code and name of the person’s home department.</td>
</tr>
</tbody>
</table>
Chapter 3: Using Browse Pages to Locate Personnel

At the end of each row, there are two button icons:

- **Edit Summary**
  - Click to display the Summary page for the person, where you can edit the distributions as needed.

- **View Summary Report**
  - Click to display a Summary Report for the person.
  - You cannot enter changes on the Summary Report.

The Personnel List shows records by person and Job#. If a person has changed departments, or is assigned part-time to two different departments, the person’s record will appear for both departments. However, you will only be able to make changes within the periods and distributions charged to department(s) for which you are authorized.

If a person has changed from one staff class to another and the Job# changes, such as when a graduate student becomes an employee, the person will appear twice on the General Browse page, because they have an additional Job#. If a person changes from one staff class to another and the Job# does not change, they will appear only once on the Personnel List, with a Staff Class of Mult. If you have limited staff access, you may only modify data in the staff class for which you are authorized.
**Pending Status: What Does it Mean to You?**

The pending statuses you are likely to see on the General Browse page depend on your approval authorization level.

<table>
<thead>
<tr>
<th>Pend Code</th>
<th>If you have departmental authorization</th>
<th>If you have central office authorization</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>You can approve changes. Records with this status will show up in your worklist.</td>
<td>P</td>
</tr>
<tr>
<td>C</td>
<td>You won’t see this.</td>
<td>C</td>
</tr>
<tr>
<td>U</td>
<td>Someone else needs to approve changes.</td>
<td>U</td>
</tr>
<tr>
<td>UC</td>
<td>The central office needs to approve changes</td>
<td>UC</td>
</tr>
<tr>
<td>UX</td>
<td>The record must be corrected, and then someone else needs to approve the changes.</td>
<td>UX</td>
</tr>
<tr>
<td>X</td>
<td>You can correct and approve disapproved changes. Records with this status will show up in your worklist.</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>No approvals are pending for this record.</td>
<td></td>
</tr>
</tbody>
</table>
Maintaining Graduate Student Support
Overview of Graduate Student Support

For most graduate students, the graduate school establishes University support at the beginning of each fiscal year. The students receive a contract that indicates what support will be provided by the University. For most students, this includes up to full tuition, and some combination of fellowship stipend and appointments as assistants in instruction or research. Each department can add and change support distributions for their graduate students using the Graduate Student Support Summary page, and the pages linked from there.

The data you enter in Labor Accounting determines what payments will be made to the students, and which project/grants will be charged for the payments. Once a month, several days before the final payroll is run, the Labor Accounting application sends data to the Payroll system on payments to be made to graduate students. After the payroll is run, Labor Accounting generates journal-voucher transactions from the distribution information and updates the Bookkeeping system.

When students pass their general exams and they have either an Assistant in Instruction or an Assistant in Research appointment, their level of support is raised. Do not enter an adjustment to provide the higher rate; the system automatically creates a new distribution period to reflect the new support level, if necessary.

Graduate student support commitments are distributed across appropriate project/grants within a fiscal year. For graduate students, the fiscal year is divided into two periods, the summer and the academic year. These are the two default distribution periods for graduate student support:

- Summer support—July 1st through August 31st
- Academic year support—September 1st through June 30th

If the support changes during the year, you will need to add a distribution period within one of these default periods to show the change in support. To add a new distribution period, you must specify the beginning date of the period. The new ending date for the previously existing period will be the day before the beginning date of the new period.
You can change the project/grant distributions and add distribution periods during the academic year. If the distribution of a person’s support payments changes during a default period, you must add a new period where you can then distribute the support payments to different department accounts or change the amounts or percentages between project/grants. Adding and deleting periods is done on the pages where support for the different earnings types is entered.

To add a new standard support type for a student, you must use the page for the earnings type to add the new earnings period, and enter either the course(s) and number of hours an Assistant in Instruction is committed to, or the percent of a whole appointment for an Assistant in Research or an Assistant Master. The percent or hours will be charged to the default project/grant set by your department for the earnings type, which you can change if necessary.

Important! For tax reasons, you may not transfer stipend support amounts between a fellowship support type and any other support type for a period that includes any part of a previous calendar year. The Graduate School Office will not approve such changes, and Payroll will not accept such changes.

Termination and leave status changes are sent from PeopleSoft Student Administration. If you have already entered these changes, you only need to verify on the Graduate Student Tuition page that the enrollment event is correct and the effective date matches the period you entered in Labor Accounting. If you have not already entered these changes, you can carry them over into Labor Accounting by clicking the Match LA to SA button on the Graduate Student Tuition page. A new period will be added, and the tuition and fees after the termination or leave date will be deleted or adjusted automatically when you click the Match LA to SA button.
Chapter 4: Maintaining Graduate Student Support

Graduate Student Pages

The pages used to set and change commitments and project/grant distributions for graduate students are all available through links on the Graduate Student Support Summary page. When you click on any of the links, the selected page is displayed, with tabs across the top of the page for all the other Graduate Student pages. The following pages are available for maintaining graduate student support:

*Table 2: Graduate Student Pages*

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Page Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Tuition &amp; Fees</td>
<td>GS Tuition</td>
<td>Used to pull in Student Administration data and make any adjustments in tuition and fees. You can also add periods and enter enrollment events, such as a leave or termination, on this page.</td>
</tr>
<tr>
<td>External Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsored Tuition</td>
<td>Sponsored Tuition</td>
<td>Used to add tuition support from an outside sponsor, usually from the US government and AT&amp;T Labs, that is billed by Student Accounts.</td>
</tr>
<tr>
<td>Tuition Billed</td>
<td>Tuition Billed</td>
<td>Used to add tuition support, usually from foreign governments, private organizations, and individuals, that will be charged to University project/grants and billed to the sponsor by the Graduate School rather than by Princeton Receivables.</td>
</tr>
<tr>
<td>Paid to Student</td>
<td>Paid to Student</td>
<td>Used to add support paid directly to the student by an outside sponsor, to clarify the total amount of support the student is receiving.</td>
</tr>
<tr>
<td>Internal Support</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Matching Tuition</td>
<td>Other Fellshp</td>
<td>Used to enter a Graduate School fellowship matching the tuition paid by an external fellowship that provides maintenance and partial tuition.</td>
</tr>
<tr>
<td>Adjustable Fellowship</td>
<td>Univ Fellshp</td>
<td>Used to enter University fellowships.</td>
</tr>
<tr>
<td>Non-adjustable Fellowship</td>
<td>Other Fellshp</td>
<td>Used to enter non-adjustable fellowship support, and departmental grants, awards, or prizes.</td>
</tr>
</tbody>
</table>
Tip! It generally requires fewer adjustments if you enter the support beginning with the external support and then the internal support, ending with the University Fellowship. It is not necessary to return to the Graduate Student Support Summary page between external support types or between internal support types; you can simply click the page tab for each type of support.
The Graduate Student Support Summary Page

You use the Graduate Student Support Summary page to review and update tuition and stipend distributions for graduate students.

When the Graduate Student Support Summary page is displayed, the distributions shown on this page include any changed distributions that have not been authorized or approved. To see the distributions that are currently in effect when changes are pending, click on the In Eff button at the bottom of the page. This displays a non-editable version of the Graduate Student Support Summary page that shows the distributions currently in effect for the selected individual.

**Tip!** You can display comments on the changes shown on the Graduate Student Support Summary page by clicking the View Cmt button.

Displaying a Student’s Support Summary

To display a student’s Support Summary page, you must locate the student on the General Browse page, and click the Edit Summary button to display the Graduate Student Support Summary page.

**To display a student’s support summary:**

1. On the General Browse page, create a current view as described in “Entering Search Criteria to Create the Current View,” on page 28.

   **Tip!** The more search criteria you use, the smaller the resulting list will be, and the easier it will be to locate the person you want.

2. In the Personnel List on the General Browse page, use the scroll bar, if needed, to locate the person whose commitments you want to see.

3. Click the Edit Summary button on the line that contains the person’s name. The Graduate Student Support Summary page is displayed.

Alternatively, you can work your way through all the records displayed on the Personnel List of the General Browse page by clicking the Next and Prev buttons on the Graduate Student Support Summary page. This is very useful when you are using the General Browse page to display your work list.
What's on the Graduate Student Support Summary Page?

The Graduate Student Support Summary page contains a summary of support data, both stipend and tuition, for one graduate student. At the top left, in the yellow banner, the student’s name, emplID, and department are displayed. Under the student identification, the earnings types for support are listed, by fiscal year.

Depending on your user profile default settings (see “Changing Your User Profile,” on page 21 for information on the user profile), one or more fiscal years may be expanded to show the support and earnings types, or they may all be collapsed. Rows that are collapsed are indicated by a plus mark:

You can click on the plus mark to expand a collapsed row into multiple rows for internal and external support. These rows can be further expanded into rows for each earnings type.

**Note:** When you click on the plus mark, the display is expanded upward to show the additional data.
To collapse the rows, click on the minus symbol at the bottom of the expanded rows.

When the support rows are expanded, each support type is a link to a page where you can specify the details about that earnings type, including adding and removing periods, and changing project/grant distributions.

The Graduate Student Support Summary page is divided into three major column groups, one each for Summer Support, Fall Term, and Spring Term. For each term, total amounts are displayed for salary, stipend, and allowances, and for tuition and fees. Totals are displayed for each term, and for the academic year and the fiscal year. The totals are displayed for reference only, and cannot be changed. The Enrollment Status for each term is displayed on the same line as the academic and fiscal year totals.

When the earnings types are expanded, the percent of support is displayed along with the amounts for each earnings type. Unsupported tuition is displayed in red.
You can enter or change data in text boxes on the Graduate Student Support Summary page, or you can click on the links in the first column to enter more detailed changes for a particular earnings type, including adding or removing a distribution period, or changing project/grant distributions.

At the bottom of the page are a series of buttons (you may need to scroll down to see them).

**Copy From**

Use to copy distribution data from the displayed person’s record.

**Copy To**

Use to paste copied data for a selected year into the displayed person’s record.

**View Cmt**

Use to display comments on the displayed person’s record.

**Note:** Contract comments are loaded whenever the system detects new contract data, so you can see the contract comments at any time. You may then choose whether or not to load the contract data for the student.

**Contract**

Use to load the University’s contracted support commitments for the student. See “Copying from the Contract,” on page 109 for more information.
Quit Edit  Use to return to the General Browse page without saving or submitting changes, if any have been made. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

**Important!** Do not use the browser’s Back button to return to a previous page. This leaves the record in Edit mode, locking out all other users until either you return to the record or the system resets overnight. If the system resets the record, any changes will be lost.

In Eff  Use to display the distributions currently in effect for the displayed person. To return to the edit page, click the Edit button.

Calc  Use to recalculate totals after making changes to distributions or commitments.

Save  Use to temporarily save changes without submitting them for approval. The record will be locked to other users for 24 hours. After that, your changes will be lost only if another user makes changes that interfere with your changes.

**Tip!** Clicking Save returns you to the browse page.

Partial  Use to approve changes at only your highest authorization level. For example, if you have department and project approval authority, clicking the Partial button will approve at the department level, but not the project level.

**Tip!** It is not necessary to save changes before submitting them for approval.

Submit  Use to approve changes at all levels you are authorized for, and submit changes for other approvals.

**Tip!** It is not necessary to save changes before submitting them for approval.

Disappr  Use to disapprove changes. You must enter a comment explaining why the changes are not approved.
Reset

Use to reset the page to the last entered values. If you have clicked any button, such as Calc or Contract, you have entered the values, and Reset will not remove them.

Help

Use to display the help topic that introduces or explains the displayed page. This button appears on most pages. If you need more help than is provided in the help topic, click the Contents button at the top of the topic page to display the help contents.

Prev

Use to display the previous record on the Personnel List. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

Next

Use to display the next record on the Personnel List. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.
Chapter 4: Maintaining Graduate Student Support

Setting Tuition Amounts and Enrollment Events

When you begin working on a graduate student’s support, you may need to specify the amount of the tuition for the academic year. You do not need to know the tuition amount. You can capture the official tuition amount on the Graduate Student Tuition page, reached by clicking on the Total Tuition and Fees (1) link on the Graduate Student Support Summary page.

The Graduate Student Tuition page also allows you to enter enrollment events, such as a leave of absence, In Absentia, and termination.

What’s On the Graduate Student Tuition Page

The Graduate Student Tuition page contains two areas:

- The area on the left shows the enrollment status changes and effective dates from the PeopleSoft Student Administration system. This data is usually current, but is not generally entered far in advance of the actual event.

- The area on the right shows Labor Accounting enrollment events, tuition, and fees. In this area, you can enter enrollment events, such as In Absentia, leave of absence, and termination, and you can enter any adjustments to the tuition and fees (this is rare, but may be done by the Graduate School in special circumstances, such as the death of a student).

An enrollment status or event that makes a student ineligible for support controls the ability to add internal support. When you add internal support, a distribution period beginning on the date of the enrollment event/status is automatically added, and you will not be able to enter support amounts for that period.

In general, Labor Accounting enrollment events will match Student Administration enrollment statuses. However, Labor Accounting is designed to provide some independence so you can enter events as soon as you know about them, which may be before the Student Administration system would capture them. It is assumed that ultimately the LA enrollment events will match the SA statuses.
If the LA enrollment events do not match the SA status, the enrollment events take precedence over the SA status information. For example, if the SA status shows the student as graduated on 2/1/07, but the LA enrollment events show the student graduating on 4/1/07, you can enter support for the period between 2/1/07 and 3/31/07. If no LA enrollment event is entered, the SA status determines whether you can add support for a period.

There are also buttons across the bottom of the page:

- **Add LA Period** Click here to add a period, if, for example, the student goes on leave in the middle of a term.
- **Calc Tuit Amts** Click here after entering enrollment events, to calculate the tuition and fees for the year. The total tuition and fees will be displayed on the Graduate Student Support Summary page, distributed appropriately across terms.
- **Match LA to SA** Click here to capture an enrollment status change from the Student Administration system for use in Labor Accounting, or to revert to the Student Administration status if Labor Accounting enrollment events are incorrect. Any fee adjustments made on this page will remain, but the enrollment events will be changed to match the Student Administration data.
- **Clear LA Events** Click here to remove all entries, both enrollment events and fee adjustments, in the Labor Accounting area of the page.
- **View In Eff** Click here to see the enrollment events and fees currently in effect.
- **Reset** Click here to return to the last values entered. Values are entered when you click any button.
Matching to Student Administration

Student Administration data will be available for any active student in Labor Accounting, including students who are on leave or who have terminated their enrollment. However, Student Administration data is never copied into Labor Accounting automatically, so you can

- Enter Labor Accounting events regardless of the Student Administration status. This is helpful when you know about an upcoming event, and want to update your commitments immediately.
- Establish budget year tuition in Labor Accounting even without Student Administration data.
- Add tuition support for the budget year without establishing entitled tuition on the Graduate Student Tuition page.

**Note:** If the LA enrollment events do not match the SA status, the enrollment events take precedence over the SA status information. For example, if the SA status shows the student as graduated on 2/1/07, but the LA enrollment events show the student graduating on 4/1/07, you can enter support for the period between 2/1/07 and 3/31/07. If no LA enrollment event is entered, the SA status determines whether you can add support for a period.

If you want to capture Student Administration status changes, or revert to Student Administration statuses if Labor Accounting enrollment events are no longer correct, you can do so by clicking the Match LA to SA button on the Graduate Student Tuition page. A new period will be added if necessary, and the tuition and fees will be automatically recalculated.

**Note:** If the Total amount on the Graduate Student Tuition page changes when you match to the Student Administration data, you may need to adjust the student’s internal support to avoid oversupporting the student. See “Correcting Oversupport,” on page 104 for more information.
Capturing the Official Tuition Amount

You do not need to know the official tuition amount in order to establish the amount of tuition support needed for a particular year and term. Instead, you can capture the official tuition and fees on the Graduate Student Tuition page. The total tuition and fee amount will be carried over to the Graduate Student Support Summary page and distributed appropriately across terms.

**Note:** Before you can capture the tuition amount, the Labor Accounting enrollment events must be populated, either by matching to Student Administration data, or by entering the enrollment events yourself. When the Labor Accounting enrollment events have been populated, the Enr Status line on the Graduate Student Support Summary page shows the student’s status for each term.

**To capture the tuition amount:**

1. From the Graduate Student Support Summary page, click on the Total Tuition & Fees (1) link. The Graduate Student Tuition page is displayed.

2. If the Labor Accounting Enroll Event fields are blank, you must populate them, either by clicking the Match LA to SA button to carry over the Student Administration enrollment events, or by selecting the appropriate enrollment events for each term yourself. Valid values are:

   - **REG**: The student is enrolled as a regular graduate student.
   - **DCE**: The student status is Degree Candidacy Extended, that is, the student has completed enrollment but not yet earned the degree, and has therefore extended their degree candidacy at a lower rate.
   - **ABS**: The student is In Absentia.
   - **ABX**: The student is DCE, in Absentia.
   - **LOA**: The student is on leave of absence.
   - **VSRC**: The student is a visiting research collaborator.
   - **GRD**: The student has graduated.
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3. If any adjustments must be made to the regular tuition, enter the amount by which the tuition and fees should be reduced in the *Adj* field, preceded by a minus sign (as in -500.00).

4. Click the *Calc Tuit Amts* button to calculate the tuition and fees.

5. Click the Summary tab to return to the Graduate Student Support Summary page.

6. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

7. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.

**Adding a Period for an Enrollment Status Change**

If a student’s enrollment status changes during a term and you want to enter the change before the Student Administration system can capture it, you will need to add a period so the tuition reflects the change in status.

**Note:** If you capture this change by matching LA to SA, the new period will be added automatically, and the tuition will be recalculated.

**To add a Labor Accounting period:**

1. On the Graduate Student Tuition page, click the Add LA Period button. The Add LA Period window is displayed.
2. Enter the date when the new period begins in the *Begin Date* field. (The period end date is the date when the next period begins.)

*Tip!* *In any date field, you can double click to display the Calendar window where you can select a date. See “Using the Calendar Window,” on page 171 if you need instructions.*

3. Select the enrollment event from the drop-down list in the *Enr. Event* field.

4. Click the Finish button. The Graduate Student Tuition page is redisplayed showing the new period, and the tuition totals will be adjusted accordingly.

5. Click the Summary tab to return to the Graduate Student Support Summary page.

6. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

7. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.
Maintaining External Support

External support includes:

- Tuition paid by a sponsoring organization and billed through Princeton Receivables
- Tuition charged to a University project/grant and billed to a sponsoring organization by the Graduate School
- Payments made directly to the student by a sponsoring organization
- Payments made to the University by the student

The Princeton Receivables system receives the support information from Labor Accounting, and bills the appropriate people the specified amounts. All the support information goes on the student’s bill, so they know exactly who is providing support, and how much support they are providing.

After adding external support, you will need to adjust the internal support to ensure that the student is not receiving more support than they need.

Adding Sponsored Tuition

If a student is receiving tuition support from a sponsoring organization outside of Princeton that is billed through Princeton Receivables, you can enter that support on the Sponsored Tuition page.

Important! The sponsor must already be entered into the Princeton Receivables system. If the sponsor is not already on the list, you must arrange with the Princeton Receivables administrator to add the sponsor to the list.

To add sponsored tuition:

1. If necessary, display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Expand the External Support lines by clicking the plus mark alongside the Total External Support (2) label.
3. Display the Sponsored Tuition page by clicking the Sponsored Tuition link on the Graduate Student Support Summary page, or clicking the Sponsored Tuition tab if you are already on one of the External Support pages.

4. Click the Add Support button to display input fields on the Sponsored Tuition page.

5. In the Sponsor field, select the name of the sponsor from the drop-down list.

   Note: If the sponsor does not show up in the drop-down list, contact the Princeton Receivables administrator to add the sponsor to the list.

6. Enter the amount of tuition the sponsor is paying in the Amount field.

7. Enter information about who to contact in the sponsoring organization, with their contact information in the Contact Info field.

8. Repeat Step 5 through Step 7 for the Spring term, as needed.

   Tip! You can use the Ctrl + C key to copy the Contact Info from the Fall term, and the Ctrl + V key to paste it into the Contact Info field for the Spring term.

9. Click the Calculate button to calculate the amounts.

10. Click the Summary tab to return to the Graduate Student Support Summary page.

11. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

12. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.

### Entering Tuition Billed through the Graduate School

For some sponsors, such as foreign governments, private organizations, and individuals, the Graduate School bills the sponsor directly. The sponsor is assigned a project/grant, which you enter on the Tuition Billed page, along with the amount to be billed for the student, and any contact information you have for the sponsor.
To add tuition billed through the Graduate School:

1. If necessary, display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Expand the External Support lines by clicking the plus mark \(^\text{+}\) to the left of the Total External Support (2) label.

3. Display the Tuition Billed page by clicking the Tuition Billed link on the Graduate Student Support Summary page, or clicking the TuitionBilled tab if you are already on one of the External Support pages.

4. Click the Add Support button to display input fields on the Tuition Billed page.

5. In the P/G field, type the 7-digit project/grant number, or double-click to display the Find Project Grant page where you can locate the project/grant to be billed. (See “Using the Find Project/Grant Window,” on page 172 for instructions.) The project/grant will be entered for both terms.

6. In the Amount field for the Fall term, enter the amount to be billed for the Fall term.

7. In the Amount field for the Spring term, enter the amount to be billed for the Spring term.

8. Enter any information about the sponsor’s contact person, such as name and phone number, in the Contact Info field.

9. If the student is receiving support from multiple sponsors that are billed through the Graduate School, repeat Step 4 through Step 8.

10. Click the Calculate button to derive the Fall and Spring totals that will appear on the Summary page.

11. Click the Summary tab to return to the Graduate Student Support Summary page.

12. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

13. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.
Entering Tuition Paid Directly to a Student

Sometimes, a sponsor pays tuition support directly to the student. It is not required that you enter this information into Labor Accounting; however, entering the amounts here provides a more complete picture of the student’s total support, and can help to prevent oversupport.

To enter tuition paid to a student directly by the sponsor:

1. If necessary, display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.
2. Expand the External Support lines by clicking the plus mark to the left of the Total External Support (2) label.
3. Display the Paid to Student page by clicking the Paid to Student link on the Graduate Student Support Summary page, or clicking the Paid to Student tab if you are already on one of the External Support pages.
4. Click the Add Support button to display input fields on the Paid to Student page.
5. In the Sponsor field, type the name of the sponsor. The name will be entered for both terms as you type.
6. Enter the amount of tuition the sponsor is paying in the Amount field.
7. Enter information about who to contact in the sponsoring organization, with their contact information in the Contact Info field.
8. Repeat Step 6 and Step 7 for the Spring term, as needed.

Tip! You can use the Ctrl + C key to copy the Contact Info from the Fall term, and the Ctrl + V key to paste it into the Contact Info field for the Spring term.

9. Click the Calculate button to calculate the amounts.
10. Click the Summary tab to return to the Graduate Student Support Summary page.
11. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.
12. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.

**Entering Tuition Paid by a Student**

If a student has committed to pay any part of the tuition him- or herself, you can enter the amount the student will pay directly on the Graduate Student Support Summary page.

**To enter student self-payments:**

1. Locate the student (if necessary) using the General Browse page (see “Locating Personnel on the General Browse Page,” on page 26). The Graduate Student Support Summary page is displayed.

   OR

1. If you are on another page of the student’s record, click the Summary tab to display the Graduate Student Support Summary page.

2. Click the plus mark next to the Total External Support for the desired year to display the external support lines.

3. On the Student Self Pay line, type the amount the student will pay in the *Tuition & Fees* field for each term.

4. Click the **Calc** button at the bottom of the page to recalculate the total support.

5. If the Summary page now shows a negative number in the Unsupported Tuition line, you must adjust the Internal Support. See “Correcting Oversupport,” on page 104.

6. If you have no further changes to make, save the record or submit it for approval by clicking the appropriate button at the bottom of the page.
Maintaining Internal Support

Internal support is funding provided by the University, in the form of

- a fellowship or grant,
- an assistant appointment, in which a salary is paid in recompense for instruction (AI), research (AR), or residential college master responsibilities (AM),
- or any combination of the above.

You can enter the amount of support a student receives in each earnings type, as well as adding or changing distributions (project/grants) within the earnings type using various pages accessible from the Graduate Student Support Summary page. You can also add new distribution periods, if necessary, on the various graduate student pages.

**Note:** You must have Department Input or Department Authorization access to make changes to graduate student support. However, a person with project/grant authorization may change distributions for the project/grants for which they are authorized.

Maintaining AI Support

AI support provides recompense in the form of salary and tuition for instructional hours spent by the graduate student. You cannot make changes to Standard AI support on the Graduate Student Support Summary page, because the support is calculated based on the number of hours worked. For Standard AI support, you must click the Standard AI link on the Graduate Student Support Summary page, and enter the hours on the Asst Instr page.

For an adjustment to the Standard AI support, you can enter the amount of the adjustment directly on the Graduate Student Support Summary page, provided that the adjustment does not require the addition of a new distribution period or project/grant. Any more complicated adjustments must be made on the Asst Instr page.

On the Asst Instr page, you can also see the number of hours the student has taught in prior terms, and if the student has passed Generals, the date when they passed. When the student has taught long enough, you can enter the date that will trigger a change in the AI Rate, and you can indicate whether the student is proficient in English.
You can also add and delete periods (see “Adding and Deleting Distribution Periods,” on page 93), add project/grants, and change distributions across project/grants on the Asst Instr page (see “Adding or Changing Project/Grant Distributions,” on page 97).

If the student is receiving summer support, you can click the Add button under Summer AI Support Commitment & Project Distribution to add the summer salary stipend and, for VSRCs only, summer tuition. See “Adding Summer Support,” on page 105 for instructions.

**Adding a Standard AI**

When entering AI support, you must include the course number for each course that the student is teaching, and the number of hours the student is expected to spend in instruction (of a precept, a class, a lab, or a language) and grading for each course. This information is used to calculate the amount of support, and is captured for the Teaching Budget.

The AI support will be distributed automatically to the project/grant set as the default for your department for AI support. If you need to change the project/grant distributions, you may do so on this page (see “Adding or Changing Project/Grant Distributions,” on page 97 for instructions).

**To add Standard AI support:**

1. On the Graduate Student Support Summary page, click the Standard AI link. The Asst Instr page is displayed.

   **Tip!** If you are on another internal support page, simply click the Asst Instr tab to display the Asst Instr page.

2. There will be at least 2 distribution periods, one for the Fall term and one for the Spring term.

   **Note:** If the student has passed the General Exam, and the post general effective date has been entered, a separate distribution period will be added automatically beginning with the post general effective date.

If you need to add another distribution period, click the Add Period button, enter the Begin Date, and click the Finish button.
3. If the student is working on more than one course, click the Add/Drop link below the Course # field to display the Add/Drop Course pop-up window. Complete the fields on the Add/Drop Course window as described in Step 4 and Step 5.

**Note:** All courses must appear on the Add/Drop Course window to be included in the AI support. If you have already added a course on the Asst Instr page, and you do not see it on the Add/Drop Course window, click the Close button to return to the Assts Instr page, and then click the Calculate button to save the information entered there. You can then return to the Add/Drop Course window to enter additional courses, and the existing course will be included.

If the student is working on only one course, complete the fields on the Asst Instr page as described in Step 4 and Step 5.

4. Enter the course number of the course the student will be teaching in the first semester in the Course# field for the first period. Include the subject code and catalog number, as in PHY 101.

5. Enter the teaching/grading contact hours per week in the Hours of Activity fields:

   - **Prept**: Enter the total time spent leading a precept
   - **Cls**: Enter the total time spent teaching a class
   - **Lab**: Enter the total time spent teaching a lab
   - **Lang**: Enter the total time spent teaching a language lab
   - **Grd**: Enter the total time spent grading.

**Note:** If the student is receiving 100% of their support from a Standard AI, the **Total Hours** would be 6. If they receive 50% of their support from the AI, the **Total Hours** would be 3.

6. If the student is working on more than one course during this period, in the Add/Drop Course window, click the Add button to add a row for the next course.

   a) Then complete the fields for the next course as described in Step 4 and Step 5.
   b) Repeat as often as needed to add all the courses the student will be working on.
c) When you have entered all the courses and hours, click the Finish button to return to the Asst Instr page.

The Course # field will show a value of MULT, and the sum of all activity hours will appear in the hours fields. The system will calculate the total hours and total salary amount in the appropriate columns.

7. Repeat Step 3 through Step 6 for the second semester period.

8. If the student is proficient in English, click on the Proficient in English checkbox in the Related Info area to select it.

9. Click the Calculate button to calculate the salary and tuition amounts and distribute the support to the department’s default project/grant for a standard AI. If you want to change the project/grant distributions, see “Adding or Changing Project/Grant Distributions,” on page 97, for instructions.
10. If you are finished with the standard AI support, click the Summary tab to return to the Graduate Student Support Summary page, or click another tab to enter support in another earnings type.

11. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Adjusting AI Support**

You can make adjustments to the Standard AI on the AI Adjustment line of the Graduate Student Support Summary page, or you can enter the adjustments on the Asst Instr page.

**Important!** All AI support must include a standard amount based on hours of activity, which means you must enter some amount in the standard AI. You may provide adjustments in addition to the standard AI amount, but you **must** provide hours of activity for every AI.

When you enter adjustments on the Graduate Student Support Summary page, and the earnings type includes multiple distribution periods, the adjustment for each period will be calculated based on the percentages of the total time in each period. If this is not what you want (for example, if you want the adjustment limited to a single period), you should enter the adjustment for the period directly on the Asst Instr page.

**Note:** Adjustments for rate changes due to passing Generals or amassing enough teaching hours to qualify for a higher rate are made **automatically** when the Generals Date or AI Rate Date is entered. If the rate change occurs within an existing period, a new period will be added beginning with the date of the rate change. See “Changing The AI Rate,” on page 67.
When you enter adjustments on the Graduate Student Support Summary page, and the earnings type is distributed across multiple project/grants, the adjustment for each project/grant will be calculated based on the percentages specified for each project/grant on the Asst Instr page. If this is not what you want (for example, if you want the adjustment limited to a single project/grant), you will have to edit the project/grant distributions on the Asst Instr page (see “Adding or Changing Project/Grant Distributions,” on page 97). For complex distributions, you might want to enter them directly on the Asst Instr page.

To adjust AI support on the Graduate Student Support Summary page:

1. On the Graduate Student Support Summary page, locate the AI Adjustment line, just below the Standard AI line.

2. To increase the AI salary for a term, enter the amount of the increase in the Sal, Stip, & Allowances field in the appropriate term. To reduce the AI salary for a term, enter a minus sign (-) followed by the amount the salary is to be reduced in the Sal, Stip, & Allowances field in the appropriate term.

3. To increase the AI tuition support for a term, enter the amount of the increase in the Tuition & Fees field in the appropriate term. To reduce the AI tuition support for a term, enter a minus sign (-) followed by the amount the tuition support is to be reduced in the Tuition & Fees field in the appropriate term.

4. Click the Calc button to recalculate the total support.

5. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.
If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To enter adjustments on the Asst Instr page:

1. If you are not already on the Asst Instr page, click the AI Adjustment link on the Graduate Student Support Summary page, or click the Asst Instr tab.

2. If there are multiple periods (for example, one for the Fall semester and one for the Spring semester), locate the period in which the adjustment should occur.

   If you need to add a new period, see “Adding and Deleting Distribution Periods,” on page 93 for instructions.

3. To adjust the salary, enter the amount over or under the standard AI salary in the Salary Amt field in the Adj line. To decrease the salary, enter the amount preceded by a minus sign.
4. To adjust the tuition support, enter the amount over or under the standard AI tuition support in the *Tuition Amt* field in the Adj line. To decrease the tuition support, enter the amount preceded by a minus sign.

**Note:** If you know only the total amount, and are not sure how much is standard support and how much is an adjustment,

a) enter the total amount in the *Salary Amt* and the *Tuition Amt* fields of the Adj line,

b) click the $ checkboxes, and

c) click the Calculate button.

The system will determine the percentage of standard support, and any amount over that will appear in the Adj fields.

5. Click the Calculate button to calculate the totals. The adjustment will also be calculated across all project/grants. To distribute the adjustment to a specific project/grant, see “Adding or Changing Project/Grant Distributions,” on page 97.

**Important!** If the Total Hours changes, you must change the Hours of Activity values so they sum to the same value as the Total Hours. You will not be able to submit the changes from the summary page if the sum of the Hours of Activity does not equal the Total Hours.

6. When the distributions are correct, you can return to the Graduate Student Support Summary page or proceed to another earnings type page by clicking on the appropriate tab.

7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.
If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Changing The AI Rate**

The AI Rate increases when a student has taught long enough (based on either hours or terms taught). When the student qualifies, you can enter the AI Rate Date on the Asst Instr page to trigger the rate change. A new period will be created, and the support amounts will be increased by the appropriate rate.

**Note:** Passing the General exams also triggers the higher rate, regardless of how many hours the student has taught.

**To change the AI Rate Date:**

1. Display the student’s Graduate Student Support Summary page as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click on the Standard AI link for the year in which the rate will change.

   **Tip!** You may need to expand a different year, by clicking on the plus mark before the year.

3. On the Asst Instr page, enter the date when the rate should change in the AI Rate Date field, in the Related Info area.

4. Click the Calculate button to recalculate the commitments. A new distribution period will be added, if the date does not fall at the beginning of an existing period.
5. When the distributions are correct, you can return to the Graduate Student Support Summary page or proceed to another earnings type page by clicking on the appropriate tab.

6. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Status Changes and AI Support**

When a student’s status changes, and the Labor Accounting Enrollment Event is added on the Graduate Student Tuition page, the amount of tuition and fees to be charged is changed. However, the amount of support provided does not automatically change. You will need to change each internal support page that applies for that student, adding a new period as needed, and entering the appropriate amount of support. For instructions on adding a new period, see “Adding and Deleting Distribution Periods,” on page 93.

**Changing and Deleting Multi-Course Activity Hours**

If you need to change the course or hours of activity for a student with multiple course responsibilities, you will need to use the Add/Drop Course window, accessed from the Asst Instr page.

**To change hours of activity or courses for a multi-course AI:**

1. If you are not already on the Asst Instr page, click on the Standard AI link on the Graduate Student Support Summary page, or click on the Asst Instr tab from any other internal support page.
2. In the AY AI Support Commitment area, locate the period for which you want to change hours of activity.

3. Click the **Add/Drop** link to display the Add/Drop Course window.

4. Make the desired changes to any of the displayed fields.

5. Click the **Finish** button to return to the Asst Instr page.

**To remove a course from a multi-course AI:**

1. If you are not already on the Asst Instr page, click on the **Standard AI** link on the Graduate Student Support Summary page, or click on the Asst Instr tab from any other internal support page.

2. In the AY AI Support Commitment area, locate the period for which you want to remove the course.

3. Click the **Add/Drop** link to display the Add/Drop Course window.

4. On the Add/Drop Course window, click the scissors at the right end of the line you want to remove.

5. If you need to adjust the hours for the remaining course(s), you can do so on the Add/Drop Course window, or, if only one course remains, on the Asst Instr page.

6. Click the **Finish** button to return to the Asst Instr page. The information will be updated, and if only a single course remains, its number will appear in the **Course #** field, rather than **MULTI**.

**Removing AI Support**

If you need to remove AI support for a student, you must zero out the Hours of Activity for the period in which the student no longer receives AI support. To remove all AI support for a student, zero out the Hours of Activity for all periods in the year.

**To remove AI support:**

1. If you are not already on the Asst Instr page, click on the **Standard AI** link on the Graduate Student Support Summary page, or click on the Asst Instr tab from any other internal support page.
2. In the AY AI Support Commitment area, locate the period for which you want to remove support. If you need to add a new period (for example, if the student will be on leave for a month), see “Adding and Deleting Distribution Periods,” on page 93 for instructions.

3. In the Hours of Activity fields, zero out all fields by typing 0.0 in each field.

   **Tip! It is not necessary to delete the Course#**.

4. If there were adjustments, zero out the $Adj$ fields for the same period.

5. Click the **Calculate** button to remove the support for the zeroed out period.

   Project/grant distributions at the bottom of the page will also reflect the changed amounts.

6. To remove any blank lines, click the **Clean Data** button at the bottom of the page.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the **Submit** button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the **Save** button. The record will be locked to other users for 24 hours.
Adding a Standard AR

AR support provides recompense in the form of salary and tuition for research work by the graduate student. You can add and make simple changes to AR support directly on the Graduate Student Support Summary page. To add or change complex distributions for Standard AR support, you can click the Standard AR link on the Graduate Student Support Summary page, and enter the percentage or amount of support on the Asst Research page.

For an adjustment to the Standard AR support, you can enter the amount of the adjustment directly on the Graduate Student Support Summary page, provided that the adjustment does not require the addition of a new distribution period or project/grant. Any more complicated adjustments must be made on the Asst Research page.

You can also add and delete periods (see “Adding and Deleting Distribution Periods,” on page 93), add project/grants, and change distributions across project/grants on the Asst Research page (see “Adding or Changing Project/Grant Distributions,” on page 97).

If the student is receiving summer support, you can click the Add button on the Asst Research page under Summer AR Support Commitment & Project Distribution to add the summer salary stipend (and tuition, if necessary, for a VSRC). See “Adding Summer Support,” on page 105 for instructions.

Adding a Standard AR

You can add a standard AR either on the Graduate Student Support Summary page, or on the Asst Research page.

If the support is a simple percentage that can be distributed to the default project/grant (determined by your department for each earnings type) in the default earnings period, you can use the Graduate Student Support Summary page. If the support requires more complex distributions, use the Asst Research page to enter the support.

Note: If the award is a sponsored project, the system will enter the bookkeeping entries for cost sharing when you enter the total tuition percentage awarded to the student. See “Working with Sponsored Projects,” on page 76 for more information.
To add a standard AR on the Graduate Student Support Summary page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. On the Standard AR line, enter the percentage of the total support to be supplied by the AR for each term.

3. Click the Calc button at the bottom of the page to recalculate the amounts and any University Fellowship percentage. Changed values will be displayed in blue.

   **Note:** If the student has passed the General Exam, and the post general effective date has been entered, a distribution period will be added automatically to reflect the increased rate for the AR.

4. If you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To add AR support on the Asst Research page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To add AR support, click the Standard AR link. The Asst Research page is displayed.

3. In the AY AR Support Commitment area, enter the percentage of total support to be provided through the AR in the Total Pct field.
4. Click the Calculate button to calculate the *Salary Amt* and *Tuition Amt*.

   **Note:** If the student has passed the General Exam, and the post general effective date has been entered, a distribution period will be added automatically to reflect the increased rate for an AR.

5. If you need to distribute the support over multiple periods, see “Adding and Deleting Distribution Periods,” on page 93.

6. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

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**Adjusting AR Support**

You can make adjustments to the standard AR support on either the Graduate Student Support Summary page, or the Asst Research page.

**Important!** All AR support must include a standard amount based on a percentage of an FTE, so the project manager or PI can certify the percentage of effort. You may provide adjustments in addition to the standard AR amount, but you **must** provide the Total Pct for every AR.

On the Graduate Student Support Summary page, any adjustments must be made to each term in which they apply.

**Tip!** If you know only the total amount of support to be provided by the AR, use the Asst Research page to enter the new total. You can then calculate the percentage of the standard grant and the adjustment based on the dollar amount you entered.
On the Asst Research page, the adjustment is made to each period. If multiple periods are displayed, you can enter an adjustment for each period, as required. If only one period is displayed, the adjustment will be made for the entire academic year. If the adjustment applies to only part of the year, you can add a distribution period, and make the adjustment to that period only. See “Adding and Deleting Distribution Periods,” on page 93 for instructions for adding a distribution period.

**Note:** Adjustments to an AR for rate changes due to passing Generals are made automatically when the Generals Date is entered. If the rate change occurs within an existing period, a new period will be added beginning with the date of the rate change.

**To adjust support on the Graduate Student Support Summary page:**

1. If you are not already on the Support Summary page for the student, display the page as described in “Displaying a Student’s Support Summary,” on page 42.

2. Locate the AR Adjustment line. Notice that there are open data fields for salary, stipend, & allowances amounts and tuition and fee amounts in each term.

3. To add support, enter the amount of additional funding in the appropriate field.

4. To reduce support, type a minus sign, followed by the amount by which the support should be reduced in the appropriate field.

5. Click the Calc button at the bottom of the page to recalculate the amounts. Changed values will be displayed in blue. If there are multiple distribution periods or project/grants, the adjustments will be distributed across the periods and project/grants based on each period’s or project/grant’s percentage of the total.

6. If you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
To adjust support on the Asst Research page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To adjust AR support, click the **Standard AR** link. The Asst Research page is displayed.

3. In the Adj line of the AY AR Support Commitment area, enter the amount of the adjustment for the **Salary Amt** and the **Tuition Amt**, as applicable. Click the Calculate button to see the recalculated totals.

   If you know only the total amount, and are not sure how much is standard support and how much is an adjustment,
   
   a) enter the total amount in the **Salary Amt** and the **Tuition Amt** fields of the Adj line,

   ![Diagram of Adj line]

   b) click the $ checkboxes, and

   c) click the Calculate button.

   The system will determine the percentage of standard support, and any amount over that will appear in the Adj fields.

4. If the support changes during different periods, see “Adding and Deleting Distribution Periods,” on page 93.

5. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

6. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.
7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

Changing AR Support

When a student’s status changes, and the Labor Accounting Enrollment Event is added on the Graduate Student Tuition page, the amount of tuition and fees to be charged is changed. However, the amount of support provided does not automatically change. You will need to change each internal support page that applies for that student, adding a new period as needed, and entering the appropriate amount of support. For instructions on adding a new period, see “Adding and Deleting Distribution Periods,” on page 93.

If an award ends or a project closes, you will need to remove the project/grant and redistribute the remaining support. See “Adding or Changing Project/Grant Distributions,” on page 97 for instructions.

Working with Sponsored Projects

Sponsored projects generally share the cost of tuition with the University. This means that when a student receives support from a sponsored project, 50% of the tuition is charged to the sponsored project, and 50% of the tuition is charged to the Asst Res Tuit project/grant (xxx1902). However, you only need to enter the total percentage of tuition charged for the AR; the system will enter the bookkeeping entries to split the tuition charges for cost sharing.

When you add an AR for a sponsored project, enter the total tuition percentage awarded through the AR. For example, if the student has a 50% AR, funded by the sponsored project, use the arrow button to copy the percentage from the AR Salary to the AR Tuition area. When you click the Calculate button, the full tuition support is calculated based on the award percentage, and then bookkeeping entries are added to deduct half the total from the project, and add it to the department’s 1902 (Asst Res Tuit) account.
The distribution lines for both bookkeeping entries are displayed after you click the Calculate button, unless you are authorized only for the original project/grant, in which case you see only the entry for the deduction from the sponsored project. Bookkeeping entries are indicated by a lower case b after the project/grant number (for deductions) and before the project/grant number (for additions).

**Removing AR Support**

If a student is no longer receiving an AR, you can remove the support on either the Graduate Student Support Summary page, or the Asst Research page. Use the Graduate Student Support Summary page to remove all support for the earnings type. If you are removing support for only part of the year, use the Asst Research page to remove the support for the affected period.

**To remove support on the Graduate Student Support Summary page:**

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Locate the line for the Standard AR.

3. Type 0 in the % fields for each term in which the student will no longer receive this type of support.

4. If there were adjustments for the AR, type 0 in the Sal, Stip, & Allowances field and the Tuition & Fees field for each term in which the student will no longer receive this type of support.

5. Click the Calc button to recalculate the total support.

6. If support needs to be redistributed to other earnings types, make the changes as described for those earnings types.
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7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To remove support on the Asst Research page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To remove AR support, click the Standard AR link. The Asst Research page is displayed.

3. If you need to remove support for only part of an existing period (for example, if a student goes on leave for a month), add a new period, as described in “Adding and Deleting Distribution Periods,” on page 93.

4. In the AY AR Support Commitment area, type 0 in the Total Pct field for each period in which the student will no longer receive this type of support.

5. If there are adjustments, type 0 in the Adj fields for each period in which the student will no longer receive this type of support.

6. If you need to remove a project/grant, see “Adding or Changing Project/Grant Distributions,” on page 97.

7. Click the Calculate button to recalculate the total support.

8. To remove any blank lines, click the Clean Data button at the bottom of the page.

9. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

10. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding a Standard AM

AM support provides recompense for assisting a residential college master. You can add and make simple changes to AM support directly on the Graduate Student Support Summary page. To add or change complex distributions for Standard AM support, you can click the Standard AM link on the Graduate Student Support Summary page, and enter the percentage or amount of support on the Asst Master page.

**Note:** Assistant Master (AM) salaries are paid through Time Collection, so the Salary Amt fields will be dimmed on the Asst Master page, and the Sal, Stip, & Allowances input boxes will not be open for input on the Graduate Student Support Summary page.

For an adjustment to the Standard AM support, you can enter the amount of the adjustment directly on the Graduate Student Support Summary page, provided that the adjustment does not require the addition of a new distribution period or project/grant. Any more complicated adjustments must be made on the Asst Master page.

You can also add and delete periods (see “Adding and Deleting Distribution Periods,” on page 93), add project/grants, and change distributions across project/grants on the Asst Master page (see “Adding or Changing Project/Grant Distributions,” on page 97).

If the student is receiving summer support, you can click the Add button on the Asst Master page under Summer AM Support Commitment & Project Distribution to add the summer salary stipend. See “Adding Summer Support,” on page 105 for instructions.

Adding a Standard AM

You can add a standard AM either on the Graduate Student Support Summary page, or on the Asst Master page.

If the support is a simple percentage that can be distributed to the default project/grant (determined by your department for each earnings type) in the default earnings period, you can use the Graduate Student Support Summary page. If the support requires more complex distributions, use the Asst Master page to enter the support.
To add a standard AM on the Graduate Student Support Summary page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. On the Standard AR or Standard AM line, enter the percentage of the total support to be supplied by the AR or AM for each term.

3. Click the Calc button at the bottom of the page to recalculate the amounts and any University Fellowship percentage. Changed values will be displayed in blue.

4. If you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To add AM support on the Asst Master page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To add AM support, click the Standard AM link. The Asst Master page is displayed.

3. In the AY AM Support Commitment area, enter the percentage of total support to be provided through the AM in the Total Pct field.

4. Click the Calculate button to calculate the Tuition Amt.

5. If the support changes during different periods, see “Adding and Deleting Distribution Periods,” on page 93.
6. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Adjusting AM Support**

You can make adjustments to the standard AM support on either the Graduate Student Support Summary page, or the Asst Master page. On the Graduate Student Support Summary page, any adjustments must be made to each term in which they apply.

On the Asst Master page, the adjustment is made to each period. If multiple periods are displayed, you can enter an adjustment for each period, as required. If only one period is displayed, the adjustment will be made for the entire academic year. If the adjustment applies to only part of the year, you can add a distribution period, and make the adjustment to that period only. See “Adding and Deleting Distribution Periods,” on page 93 for instructions for adding a distribution period.

*Tip!* If you know only the total amount of support to be provided by the AM, use the Asst Master page to enter the new total. You can then calculate the percentage of the standard grant and the adjustment based on the dollar amount you entered.

**To adjust support on the Graduate Student Support Summary page:**

1. If you are not already on the Support Summary page for the student, display the page as described in “Displaying a Student’s Support Summary,” on page 42.

2. Locate the AM Adjustment line. Notice that there are open data fields for tuition and fee amounts in each term.
3. To add support, enter the amount of additional funding in the appropriate field.

4. To reduce support, type a minus sign, followed by the amount by which the support should be reduced in the appropriate field.

5. Click the Calc button at the bottom of the page to recalculate the amounts. Changed values will be displayed in blue. If there are multiple distribution periods or project/grants, the adjustments will be distributed across the periods and project/grants based on each period’s or project/grant’s percentage of the total.

6. If you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To adjust support on the Asst Master page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To adjust AM support, click the Standard AM link. The Asst Master page is displayed.

3. If the adjustment does not apply to the entire period, add a new period as described in “Adding and Deleting Distribution Periods,” on page 93.

4. In the Adj line of the AY AM Support Commitment area, enter the amount of the adjustment for the Tuition Amt, as applicable. Click the Calculate button to see the recalculated totals.

If you know only the total amount, and are not sure how much is standard support and how much is an adjustment,

a) enter the total amount in the Tuition Amt fields of the Adj line,

b) click the $ checkboxes, and
c) click the Calculate button. The system will determine the percentage of standard support, and any amount over that will appear in the Adj fields.

5. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

6. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
**Changing AM Support**

When a student’s status changes, and the Labor Accounting Enrollment Event is added on the Graduate Student Tuition page, the amount of tuition and fees to be charged is changed. However, the amount of support provided does not automatically change. You will need to change each internal support page that applies for that student, adding a new period as needed, and entering the appropriate amount of support. For instructions on adding a new period, see “Adding and Deleting Distribution Periods,” on page 93.

**Removing AM Support**

If a student is no longer receiving an AM, you can remove the support on either the Graduate Student Support Summary page, or the Asst Master page. Use the Graduate Student Support Summary page to remove all support for the earnings type. If you are removing support for only part of the year, use the Asst Master page to remove the support for the affected period.

**To remove support on the Graduate Student Support Summary page:**

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Locate the line for the Standard AM.

3. Type 0 in the % fields for each term in which the student will no longer receive this type of support.

4. If there were adjustments for the AM, type 0 in the Tuition & Fees field for each term in which the student will no longer receive this type of support.

5. Click the Calc button to recalculate the total support.

6. If support needs to be redistributed to other earnings types, make the changes as described for those earnings types.

7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.
If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To remove support on the Asst Master page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. To remove AM support, click the Standard AM link. The Asst Master page is displayed.

3. If you only need to remove support for part of an existing period, add a new period as described in “Adding and Deleting Distribution Periods,” on page 93.

4. In the AY AM Support Commitment area, type 0 in the Total Pct field for each period in which the student will no longer receive this type of support.

5. If there are adjustments, type 0 in the Adj fields for each period in which the student will no longer receive this type of support.

6. If you need to remove a project/grant, see “Adding or Changing Project/Grant Distributions,” on page 97.

7. Click the Calculate button to recalculate the total support.

8. To remove any blank lines, click the Clean Data button at the bottom of the page.

9. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

10. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding a University Fellowship

University fellowships include

- the standard, adjustable University Fellowship.
- non-adjustable University fellowships (generally, a departmental fellowship).
- a fellowship which matches the tuition support from an external fellowship that provides maintenance and partial tuition, and is charged to a particular project/grant.
- and any special grants, awards, or prizes from the University that are paid in a single month.

In the graduate student's annual support contract with the University (either the Admission contract or the Reenrollment contract), the minimum amount of University support is established for the year. In the absence of any other support, the student is paid this amount in fellowship support. Hence, the default support type for all graduate students is the adjustable University Fellowship. Until you add another internal support type, the adjustable University Fellowship will be 100%. However, until you capture the Total Tuition and Fees, the amounts will remain 0.

Adding an Adjustable University Fellowship

The amount of stipend support (not including tuition) established in the graduate student contract is entered into the Full Term Stipend Amt field on the Univ Fellshp page to record the full amount of the fellowship contract.

If the student receives only the University Fellowship stipend, they will receive the full amount entered in the Full Term Stipend Amt field. If the student also receives an AI, AR, or AM appointment, the fellowship stipend will be reduced by the amount of the appointment stipend. However, the Full Term Stipend Amt does not change, and if the appointment is removed, the fellowship stipend would return to the full amount (which is why you need to enter and store the full, contract, amount).

The percent of support provided by the adjustable University fellowship is automatically adjusted when you add or change AI, AR, or AM support. However, the actual amount of support must be calculated on the Univ Fellshp page.
**Tip!** Because the percent for the adjustable University fellowship is automatically adjusted when you add or change an AI, AR, or AM appointment, it is most efficient to enter them first. Then, when all other support for the student has been entered, open the Univ Fellshp page to calculate the actual stipend and tuition amounts to be provided by the adjustable University Fellowship.

**To add an adjustable University fellowship:**

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click on the Adjustable Fellowship link to display the Univ Fellshp page. Notice that the Total Pct field already shows the percent of support to be provided by the fellowship.

3. If the contract includes a stipend, enter the complete amount of the stipend for a single term in the Full Term Stipend Amt field.

4. Click the Calc Tuition button to calculate the tuition, based on the total tuition required and the percentage of the total indicated in the Total Pct field. The stipend and tuition are distributed to the default project grant specified for your department.

5. If you need to distribute the support across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 97.

6. If you need to change the support in different periods, see “Adding and Deleting Distribution Periods,” on page 93.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Changing an Adjustable University Fellowship

If you add an AI, AR, or AM appointment, the total percentage of the University Fellowship changes automatically. However, the tuition amounts for the University Fellowship must be recalculated. To recalculate the tuition amounts, use the Calc Tuition button on the Univ Fellshp page.

If the student gains additional external support, other support from the University would be reduced. When this happens, you must also recalculate the tuition amounts on the Univ Fellshp page.

Occasionally, a contract change may result in a change to the Full Term Stipend amount. If that happens, you must enter the new Full Term Stipend amount on the Univ Fellshp page.

To recalculate tuition after changing appointments or external support:

1. From the Graduate Student Support Summary page, click the Adjustable Fellowship link, or from any other internal support page, click the Univ Fellshp tab. The Univ Fellshp page is displayed.

2. Click the Calc Tuition button to recalculate the tuition based on the changed percentage.

3. If you need to change project/grant distributions, see “Adding or Changing Project/Grant Distributions,” on page 97.

4. If you need to change the support in different periods, see “Adding and Deleting Distribution Periods,” on page 93.

5. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

6. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
To change the Full Term Stipend amount:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click on the Adjustable Fellowship link to display the Univ Fellshp page. Notice that the Total Pct field already shows the percent of support to be provided by the fellowship.

3. In the Full Term Stipend Amt field, type the changed amount of the stipend for a single term.

4. Click the Calculate button to recalculate the total stipend for the academic year, based on the amount you entered in the Full Term Stipend Amt field.

5. If you need to change project/grant distributions, see “Adding or Changing Project/Grant Distributions,” on page 97.

6. If you need to distribute the support over multiple periods, see “Adding and Deleting Distribution Periods,” on page 93.

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding Matching Tuition

When an external fellowship provides maintenance and partial tuition, the Graduate School may match the tuition provided by that fellowship, unless the student holds an AI or AM appointment that picks up the rest of the tuition, or the contract does not specify full support. Matching tuition is always charged to project/grant 9711000.

To add matching tuition on the Graduate Student Support Summary page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Enter the matching tuition amount for each term in the input boxes on the Matching Tuition line.

3. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To add matching tuition on the Other Fellowship page:

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click the Matching Tuition link to display the Other Fellowship page.

3. In Tuition Amt field of the AY Matching Fellowship Tuition area, enter the amount of tuition to be matched in the displayed period (usually, the full academic year). This amount will be distributed to project/grant 9711000.

4. If the matching tuition is not required for the full period, you can add another period as described in “Adding and Deleting Distribution Periods,” on page 93, and adjust the amount for the new period.

5. Click the Calculate button to derive the Fall and Spring totals.
6. When you have entered the matching tuition, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Adding a Non-adjustable Fellowship**

A non-adjustable fellowship is an award in which the stipend and fellowship do not change based on increased or decreased support from other sources. Non-adjustable fellowships are always charged to a University project/grant.

Other awards included in the Non-adjustable Fellowship line on the Summary page include special fellowship grants, awards, or prizes paid in a single month. On the Graduate Student Support Summary page, the non-adjustable stipend will include these other awards.

**To add a non-adjustable fellowship:**

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click the Non-adjustable Fellowship link to display the Other Fellowship page.

3. In the AY Non-adjustable Fellowship Support area (at the top of the page), click the Add button to display the Add Period window.

   a) The *Begin Date* and *End Date* are filled in by default with the dates for the academic year. If the period is not for the entire academic year, enter the appropriate dates.

   **Tip! Double click on the date fields to open the Calendar window, where you can select the date you want. See “Using the Calendar Window,” on page 171 for more information.**
b) In the P/G field, type the seven-digit project/grant number to be charged, or double click to open the Find Project/Grant window. (See “Using the Find Project/Grant Window,” on page 172 for more information.)

c) If the fellowship is providing a stipend, enter the total amount to be paid for the period in the Stip Amt field. If the period is the academic year, the amount should be the total for both terms.

d) If the fellowship is paying tuition, enter the total tuition support provided by the fellowship during the specified period in the Tuit Amt field. If the period is the academic year, the amount should be the total for both terms.

e) Click the Finish button to enter the support and return to the Other Fellowhp page. The Fall and Spring totals will be calculated automatically, based on the total amounts for the academic year.

4. When you have entered the non-adjustable fellowship, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

5. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To add a special grant, award, or prize paid in one month:**

1. Display the Graduate Student Support Summary page for the student as described in “Displaying a Student’s Support Summary,” on page 42.

2. Click the Non-adjustable Fellowship link to display the Other Fellowhp page.

3. In the Special AY Fellowship Grant, Award, or Prize... area (at the bottom of the page), click the Add button to display the Add Period window.

   a) In the Month field, select the month when the award is paid from the drop-down list.
b) In the P/G field, type the seven-digit project/grant number to be charged, or double click to open the Find Project/Grant window. (See “Using the Find Project/Grant Window,” on page 172 for more information.)

c) In the Stip Amt field, type the amount of stipend to be paid in that month by the special award.

d) Click the Finish button to enter the support and return to the Other Fellowship page.

4. When you have entered the award or prize, you can return to the Graduate Student Support Summary page by clicking the Summary tab, where the award amount will be included in the non-adjustable fellowship stipend, or select another internal support type by clicking on the appropriate tab.

5. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Removing a University Fellowship**

The only way to remove an adjustable University Fellowship is to provide enough support through other University awards or appointments to zero out the percentage for the adjustable fellowship. However, matching tuition and non-adjustable University Fellowships can be removed by zeroing out the commitments and recalculating.

**Adding and Deleting Distribution Periods**

You can add, change, or delete distribution periods for any earnings type. Each earnings type must have at least one distribution period, so if only one distribution period exists for an earnings type, it cannot be deleted.

If you are adding or removing a distribution period only to change to project/grant distributions, see “Adding or Changing Project/Grant Distributions,” on page 97.
To add distribution periods in a support type:

1. From the General Browse page, select the person you want to update by clicking the Edit button on that line. The Graduate Student Support Summary page appears.

2. Locate the earnings type that needs a new distribution period, and click on the link to open the page for that earnings type.

3. In the AY...Support Commitment area, click on the Add Period button. The Add Period window is displayed.

   **Tip! You can cancel the add by clicking on the Cancel button.**

4. In the Begin Date field, type the starting date for the new time period using the format m/d/yyyy, or double click in the field to display a calendar where you can select the date.

5. Click on the Finish button (or press the Tab and then the Enter key). The page will be redisplayed with the new distribution period using the percentages from the previous period. The end date of the new period is what was the end date of the previous period, and the end date of the previous period is the day before the beginning date you entered for the new period.
6. Change the percentage of support or make any adjustments needed for this earnings type in this period. For an AI, enter or change the *Hours of Activity* for the new period.

   **Note:** If you know the dollar amount for the period, click the appropriate $ checkbox and type the amount in the *Salary Amt* or *Tuition Amt* field on the Adj line. The percentages of the standard commitment and the adjustment will be calculated for the period, based on the dollar amount you enter.

   **Important!** *If you make an adjustment this way for an AI, be sure to correct the Hours of Activity values to match the recalculated Total Hours value. You will not be able to submit the changes if the hours do not match.*

7. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

8. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To delete an existing distribution period:**

1. From the General Browse page, select the person you want to update by clicking the Edit button on that line. The Graduate Student Support Summary page appears.

2. Locate the earnings type for which a distribution period needs to be deleted, and click on the link to open the page for that earnings type.

   **Note:** Deleting a distribution period for one earnings type may necessitate similar changes in another earnings type. Be sure to make all the necessary changes in all earnings types.
3. In the Support Commitment area, click on the Del. Period button. The Delete Period window is displayed.

**Note:** If there is only one period, it cannot be deleted; the Del. Period button will be disabled (indicated by a dimmed button).

*Tip!* You can cancel this action by clicking on the Cancel button.

4. In the Begin Date field, select the beginning date of the period you want to remove from the drop-down list, and click the Finish button. You are returned to the page, and the distribution period is deleted. The previous distribution period is extended to the date when the deleted period ended, and the support commitments are recalculated.

5. If the support commitments for the remaining period(s) need to be changed, enter the desired values as described for adding the earnings type.

6. When the support commitments are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding or Changing Project/Grant Distributions

Project/grant distributions can be added or changed by users who are authorized for that project/grant, or by users who are authorized for any department. If the user who makes the changes is not authorized for that project/grant, the changes are submitted for approval by the owner of the project/grant.

Important! You will not be able to enter distributions for projects that are closed (that is, before the project open date or after the project close date). If the current date is after the project close date, you cannot enter distributions to that project, because it would require booking the changes after the close date.

While you can change existing project/grant distributions, you cannot change the project/grant numbers. If an incorrect project/grant has been charged, you must zero out the distributions charged to that project/grant, click the Clean Data button to remove the project/grant, and then add the correct project/grant and its distributions.

Note: The Clean Data button will not remove the default project/grant line, even if it contains only zeros.

When you add a non-default project/grant, the default project/grant is adjusted automatically, so the total commitment remains the same. If a new project/grant provides additional support, resulting in a change in the total amount for the term, you must update the support commitments for the earnings type, adding a new distribution period if necessary. See “Adding and Deleting Distribution Periods,” on page 93 for instructions for adding distribution periods.

If you or a project owner reduces the commitment to a project/grant, the offset is moved to the default project/grant for that earnings type. Some default project/grants are funded project/grants, and you may leave the offset there. However, other project/grants, such as nnn1998, are not funded, and the offset should be moved to a funded project/grant before a payroll is charged.

If there are multiple project/grants, you can enter a value in the line for one project/grant and check the Bal checkbox in another line to distribute the remaining commitment to that project/grant, rather than to the default project/grant.
When adding a project/grant, you can look for the project/grant number using any of the following search criteria:

- The first several digits of the project/grant number. The resulting project/grant list will be limited to project/grants that begin with the specified digits.
- The department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.
- Sponsored projects. If you check this box, only sponsored projects will be listed.
- Primary Investigator. All projects with the specified P.I. will be listed.
- Fund. All project/grants that use this fund code will be listed.

If you select multiple search criteria, the resulting list will include only those project/grant numbers that match all of the specified criteria.

To add a project/grant to an existing period:

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that needs to be redistributed to a different project/grant, and click on the link for that earnings type.

3. On the earnings type page, click the Add P/G button in the AY Project Distribution area. The Find Project Grant window is displayed.
4. Enter the desired search criteria:

   **Begin**
   Enter the first several digits of the project/grant number. The resulting project/grant list will be limited to project/grants that begin with the specified digits.

   **Dept**
   Enter the department number of the department that owns the project/grant. The resulting project/grant list will be limited to project/grants in the specified department. You can list project/grants in any department, even those you are not authorized for.

   If you are authorized for only one department, that department will be displayed as the default search criteria, but you can change it, if necessary.

   **Sponsored Project**
   Click on this checkbox to list only sponsored projects (projects in the Fund 40 or 60 series).

   **P. I.**
   Select the primary investigator from the drop-down list. All projects with the specified P. I. will be listed. If you select **All**, the list will not be filtered by P. I.

   **Fund**
   Select the desired fund code from the drop-down list. All project/grants that use this fund code will be listed. If you select **All**, the list will not be filtered by fund code.

5. Select the desired project/grant number by scrolling through the list and clicking on the desired project/grant. Click the **Finish** button to add the new project/grant number.

   **Note:** If the desired project/grant is not included in the list, contact the Controller’s Office.
The earnings type page is redisplayed with a new line for the new project/grant.

**Note:** If you selected a project/grant that is closed for any portion of the distribution period, the project/grant is added, but the distribution period ends on the date when the project/grant is closed. Because the closed project/grant must have Distrib Amts of 0.00 (zero) in the period for which it is closed, an additional distribution period is added with zero amounts that cannot be changed for the closed project.

6. If you know the FTE percentage to be charged to the new project/grant for salary:

   a) Type the percentage of a full-time FTE to be charged to the project/grant in decimal format (50% is entered as 0.50) in the Distrib FTE field.

   **Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.

   b) Click the Calculate button to calculate the Distrib % and Distrib Amt for the Salary, based on the Distrib FTE value.

If you know the dollar amount for the salary to be charged to the new project/grant:

   a) Click the $ checkbox under the Salary heading to open the Distrib Amt field for input.

   b) Type the salary amount to be charged to this project/grant in the Distrib Amt field.

   **Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.

   c) Click the Calculate button to calculate the Salary Distrib FTE and Distrib % values for all of the project/grants.
7. If the tuition to be charged to the new project/grant is the same percentage of the total distribution as the salary, click the Copy icon to carry the Distrib % value over to the Tuition area. Then click Calculate again to calculate the distributions for the tuition.

If the tuition will not be charged to the new project/grant at the same percentage as the salary, you can enter the Tuition Distrib %, or click the Tuition $ checkbox and enter the Tuition Distrib Amt. Then click Calculate again to calculate the distributions for the tuition.

**Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions before you click the Calculate button.

8. When the distributions are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

9. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To change project/grant distributions without adding a new period:**

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that needs to be redistributed, and click on the link for that earnings type.
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3. To change the salary distributions by percentage:

   a) Type the percentage of a full-time FTE to be charged to the project/grant in decimal format (50% is entered as 0.50) in the Distrib FTE field.

   ![Note: If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.]

   b) Click the Calculate button to calculate the Distrib % and Distrib Amt for the Salary, based on the Distrib FTE value.

To change the salary distributions by dollar amount:

a) Click the $ checkbox under the Salary heading to open the Distrib Amt field for input.

b) Type the salary amount to be charged to this project/grant in the Distrib Amt field.

![Note: If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.]

c) Click the Calculate button to calculate the Salary Distrib FTE and Distrib % values for all of the project/grants.

4. If the tuition is the same percentage of the total distribution as the salary, click the Copy icon to carry the Distrib % value over to the Tuition area. Then click Calculate again to recalculate the distributions for the tuition.

If the tuition will not be charged at the same percentage as the salary, you can enter the Tuition Distrib %, or click the Tuition $ checkbox and enter the Tuition Distrib Amt. Then click Calculate again to recalculate the distributions for the tuition.

![Note: To distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions before you click the Calculate button.]

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5. When the distributions are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

6. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To delete a project/grant from a distribution period:**

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that needs to be redistributed, and click on the link for that earnings type.

3. Type zeros in the Salary Distrib FTE field and the Tuition Distrib % field for the project/grant you want to delete.

   **Note:** To distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.

4. Click the Calculate button to zero out the remaining fields for the project/grant. The distributions will be re-allocated to the default project/grant, unless you check the Bal checkbox for another project/grant.

   **Note:** If the default project/grant is not funded, you should move the offset to a funded project/grant.

5. Click the Clean Data button to remove the zeroed out project/grant line.

6. When the distributions are correct, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.
7. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Correcting Oversupport**

When the Graduate Student Support Summary page shows a negative number in the Unsupported Tuition line, the student is oversupported. You must decrease the internal support by the amount shown on the Unsupported Tuition line for each term. You can adjust the tuition in the Adjustable Fellowship, or by entering a negative number in the AI Adjustment, AR Adjustment, or AM Adjustment Tuition & Fees field.

*Tip! If you want to split the adjustment across more than one internal support type, it is easiest to change the assistanceships first, and then the Adjustable Fellowship.*

**To correct the assistanceships on the Graduate Student Support Summary page:**

1. To reduce the tuition support from a Standard AI, enter a minus sign followed by the amount by which you want to reduce the AI tuition in the Tuition & Fees field on the AI Adjustment line.

2. To reduce the tuition support from a Standard AR, enter a minus sign followed by the amount by which you want to reduce the AR tuition in the Tuition & Fees field on the AR Adjustment line.

3. To reduce the tuition support from a Standard AM, enter a minus sign followed by the amount by which you want to reduce the AM tuition in the Tuition & Fees field on the AM Adjustment line.

4. Click the Calc button at the bottom of the page to update the displayed totals.

**Note:** If more complex adjustments are required (for example, if the adjustment will require the addition of a distribution period, or a new project/grant), see the instructions for the earnings type that needs adjustment.
To correct the Adjustable Fellowship:

1. On the Graduate Student Support Summary page, click the Adjustable Fellowship link to display the Univ Fellshp page.

2. Click the Calc Tuition button in the middle of the page to recalculate the remaining tuition and adjust the tuition support amount accordingly.

3. Click the Summary tab to return to the Graduate Student Support Summary page. The tuition will be adjusted and the Unsupported Tuition line will display zeros for both terms.

Adding Summer Support

Summer support can be added under an AI, AR, or AM, or a standard University Fellowship. If a student is a VSRC (visiting research collaborator), tuition support may be required in the summer period as well.

To add summer support:

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that will supply the summer support, and click on the link for that earnings type.

3. In the Summer Support area of the earnings type page, click the Add button. The Add Summer Period window is displayed.

4. The Begin Date and End Date fields default to the dates for the complete summer period. If this is not what you want, enter the appropriate values:
   a) In the Begin Date field, type the date when summer support will begin, in m/d/yyyy format, or double click in the field to display a calendar window where you can select the desired date. (If you need instructions for using the calendar, see “Using the Calendar Window,” on page 171.)
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b) In the *End Date* field, type the date when summer support will end, in *m/dd/yyyy* format, or double click in the field to display a calendar window where you can select the desired date. (If you need instructions for using the calendar, see “Using the Calendar Window,” on page 171.)

5. In the *P/G* field, type the project/grant number if you know it, or double click to display the Find Project/Grant window. (If you need instructions on using the Find Project/Grant window, see “Using the Find Project/Grant Window,” on page 172.)

6. Type the amount of stipend to be charged to the project/grant for the entire period in the *Stip Amt* field.

7. If the student is a VSRC, type the amount of tuition support to be charged to the project/grant for the entire period in the *Tuit Amt* field.

8. Click the Finish button to add the summer support.

9. When you have made all the changes you need to make on this page, you can return to the Graduate Student Support Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

10. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
You can copy distributions from one graduate student to another. Copying distributions is a two-step process, like a Windows copy and paste:

- First, you copy from the Graduate Student Support Summary page for the student with the distributions you want. All the distributions on the page are copied, even if they are not expanded.
- Then you copy those distributions to the student who requires the same commitments, specifying which year’s distributions to copy. If you are copying from a record with pending changes, you may specify whether you want to copy the distributions currently in effect, or the pending changes.

**To copy distributions:**

1. From the General Browse page, select the person you want to copy from by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Make any changes that are required for both students.

3. Click the Copy From button. When the message **Copy From has been set up successfully** appears, click the OK button to continue. All distributions for the selected person have been copied.

4. Return to the Personnel list on the General Browse page by clicking the Save or Submit button if you have made changes, or the Quit Edit button if you have made no changes.

5. Select the person who should have the same distributions by clicking the Edit Summary button on the line for that student. The Graduate Student Support Summary page appears, showing the selected person's distributions.

6. Click the Copy To button. The Copy To window is displayed.
7. Verify that you are copying the information from the student you copied from in Step 3.

8. Select the academic year of the distributions you want to copy, by clicking on the radio button before the year.

9. If you are copying from a record with pending changes, select the distributions you want to copy by clicking on the radio button.

   - **In Effect** to copy the distributions currently in effect
   - **Pending** to copy the distributions that are pending approval

10. Click the Finish button to copy the distributions.

11. When you are finished with changes for this student, click the Submit button on the Graduate Student Support Summary page to save your changes and submit them for approval.

    If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Copying from the Contract

When the graduate student has accepted and signed the contract, you can load the contract data directly into Labor Accounting. The total support awarded in the contract is loaded into the Adjustable University Fellowship. You may redistribute the internal support if the student receives an AI, AR, or AM appointment. Labor Accounting will automatically adjust the support charged to the University Fellowship as you add or remove additional appointments.

To copy support totals from the contract:

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Click the Contract button (in the first set of buttons at the bottom of the page). A message window displays 200x contract data loaded.

3. Click the OK button to return to the Graduate Student Support Summary page. The contracted support totals for stipend/salary and tuition will be displayed in blue on the Adjustable Fellowship line.

   **Note:** If the contract includes summer support, you will find it in the next fiscal year, since the contract covers September through the following August.

4. Make any other changes that are required for the types of support the student will receive, using the detail pages as needed.

5. When you have made all the required changes, save or submit your changes as described in “Saving and Authorizing Changes,” on page 166.
Terminating Support for Students Who Leave

Terminating support for a student in Labor Accounting involves the following steps:

- Capturing the enrollment event or Student Administration status change.
- Recalculating the tuition payment, which is pro-rated based on the number of days the student was enrolled as an active student. (The actual amount due comes from the Entitlement Table, which shows how much tuition Princeton is entitled to for the number of days the student was enrolled.)
- Zeroing out support in the earnings period beginning with the termination date for each of the student’s appointments (AI, AR, or AM).

To terminate support:

1. From the General Browse page, select the person you want to terminate by clicking the Edit Summary button on that line. The Graduate Student Support Summary page appears, showing the selected person's distributions.

2. Click the Total Tuition & Fees link to display the Graduate Student Tuition page.

3. If the Student Administration data shows the termination, you can click the Match LA to SA button to capture the termination in Labor Accounting.

   If the Student Administration data does not show the termination yet, you can add the enrollment event yourself:

   a) Click the Add LA Period button.

   b) In the Begin Date field, type the date of the termination in m/d/yyyy format, or double click to open the Calendar window, where you can select the date. (If you need instructions on using the calendar window, see “Using the Calendar Window,” on page 171.)

   c) In the Enr. Event field, select TRM or WTH from the drop-down list.

   d) Click Finish to return to the Graduate Student Tuition page.
4. If the student has terminated before the beginning of the Spring term, change the *Enroll Event* for the Spring term by selecting **TRM** or **WTH** from the drop-down list, using the same value as in Step c, above.

5. Click the Calc Tuit Amts button to recalculate the tuition owed to the University.

```
Note: If the amount of tuition owed to the University is not the standard amount from the Entitlement Table, check with the Graduate School Budget Office before proceeding further. If they authorize the change, type the difference in the *Adj* field for the new period.
```

6. If the student had an AI appointment, click on the Asst Instr tab to display the Asst Instr page.

   a) In the new period (after the termination), zero out the *Hours of Activity* and any values in the Adj line.

   b) Click the Calculate button to recalculate the AI support.

7. If the student had an AR appointment, click on the Asst Research tab to display the Asst Research page.

   a) In the new period (after the termination), zero out the *Total Pct* and any values in the Adj line.

   b) Click the Calculate button to recalculate the AI support.

8. If the student had an AM appointment, click on the Asst Master tab to display the Asst Master page.

   a) In the new period (after the termination), zero out the *Total Pct* and any values in the Adj line.

   b) Click the Calculate button to recalculate the AI support.

9. Click the Summary tab to display the Graduate Student Support Summary page.

10. To save your changes and submit them for approval, click the Submit button on the Graduate Student Support Summary page.

    If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Overview of Faculty and Staff Commitments

Faculty and staff commitments (salary, compensation, and status data) come from the PeopleSoft Human Resources system, and are updated nightly. You can review and update committed distributions for employees and faculty members using the Faculty & Staff Commitment Summary page.

For faculty and staff members, the data you enter in Labor Accounting only determines which project/grants will be charged for the payments. The actual commitments come from the Payroll system, and cannot be changed in Labor Accounting. The only exception is the faculty summer salary, for which you can enter the encumbrance as well as the distribution in Labor Accounting. The summer salary must then be approved by the Office of the Dean of the Faculty before any summer salary can be paid.

Earnings Periods and Distribution Periods

All distributions of salary charges are made within distribution periods. For most staff members, the system commits regular salaries in a single earnings period that usually begins at the beginning of a fiscal year (when salary increases are given). The period then continues until a new commitment is entered. The fiscal year begins on July 1st.

For faculty, the system encumbers salary in two earnings periods. Summer salaries appear in a period that runs from July 1st through August 31st. Regular salaries appear in a period that begins with the fall term, on September 1st and ends with the end of the spring term, on June 30th. The following figure shows the default earnings periods for faculty members.

![Earnings Periods Diagram]

The fiscal year for bi-weekly employees changes depending on when the pay periods fall. For example, the 2004 fiscal year for bi-weekly employees began on June 9th, 2003 (because the pay date of the first pay period was July 2nd). The next fiscal year began on June 21, 2004.

**Tip!** An entry will be displayed in the Status area at the top of the View Comments page for any status change that results in a new earnings period.
For all employees, the system creates new salary earnings periods at the beginning of each fiscal year. If a compensation adjustment such as a promotion, or a change in status such as a leave occurs at another time of the year, the system automatically creates a new earnings period. Earnings periods are displayed in the Commitment area of the detail pages for each earnings type.

Distribution periods are displayed in the Distribution area of the detail pages for each earnings type. For permanent faculty and staff members, the default distribution period is generally shown beginning on the first day of the fiscal year and ending on 12/31/2999. You can change the default distributions as needed to reflect actual distributions or subsequent changes, and you may create new distribution periods in addition to those automatically generated by the system. If the distribution of a person’s salary changes during an existing period, you must add a new period in the Distribution area where you can then distribute the charges to different project/grants or change the amounts or percentages between project/grants.

To add a distribution period for the full fiscal year (that is, not ending on 12/31/2999), click the Add Yr End button. To add a distribution period for less than a full fiscal year, you must specify the beginning date of the period. The system assumes that the ending date for a new distribution period is the day before the beginning date for the next sequential period, or the end of the fiscal year. Periods are arranged according to date, and the new period is added in the appropriate spot.

For example, if you have a period that begins at the beginning of the fiscal year and another that begins on February 1st, and you add a distribution period beginning November 15th (keep in mind that the fiscal year begins on July 1), the November period is added before the February period, and the ending date of the newly added period will be January 31st, as shown below.

For information on changing salary distributions and distribution periods, see “Adding or Changing Project/Grant Distributions,” on page 126, or “Adding and Deleting Distribution Periods,” on page 122.
## Faculty and Staff Pages

The pages used to change project/grant distributions for faculty and staff members are all available through links on the Faculty & Staff Commitment Summary page. When you click on any of the links, the selected page is displayed, with tabs across the top of the page for all the other Faculty & Staff pages. The following pages are available for maintaining distributions for Faculty & Staff Commitments:

### Table 3: Faculty & Staff Pages

<table>
<thead>
<tr>
<th>Link Name</th>
<th>Page Tab Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular Pay</td>
<td>REG</td>
<td>Used to maintain distributions for regular salary commitments.</td>
</tr>
<tr>
<td>Summer Salary</td>
<td>Fac Summ</td>
<td>Used to enter encumbrances and maintain distributions for summer salary commitments.</td>
</tr>
<tr>
<td>Chair/Dean Override</td>
<td>Chair/Dean</td>
<td>Used to maintain distributions for department chair or dean appointments.</td>
</tr>
<tr>
<td>Chapel Housing</td>
<td>Chap Hsng</td>
<td>Used to maintain distributions for a housing allowance for the University chaplain.</td>
</tr>
<tr>
<td>Workers Compensation /Workers Compensation - Ext</td>
<td>Wk Comp</td>
<td>Used to maintain distributions for payments made from workers compensation funds.</td>
</tr>
<tr>
<td>Temporary Disability /Temporary Disability - Ext</td>
<td>Temp Dis</td>
<td>Used to maintain distributions for payments made from temporary disability funds.</td>
</tr>
<tr>
<td>VF/VRF Stipend</td>
<td>VR/F Stip</td>
<td>Used to maintain stipend distributions for Visiting Fellows and Visiting Research Fellows.</td>
</tr>
<tr>
<td>VF/VRF Salary Sup</td>
<td>VR/F Sal</td>
<td>Used to maintain salary support distributions for Visiting Fellows and Visiting Research Fellows.</td>
</tr>
<tr>
<td>Summary</td>
<td></td>
<td>Click this tab to return to the Faculty &amp; Staff Commitment Summary page.</td>
</tr>
</tbody>
</table>
The Faculty & Staff Commitment Summary Page

You use the Faculty & Staff Commitment Summary page to review and update distributions for faculty and staff commitments for salary (regular and summer), workers compensation and disability, and other forms of compensation such as chair/dean appointments, chapel housing, and stipend and salary for visiting fellows and visiting research fellows.

When the Faculty & Staff Commitment Summary page is displayed, the distributions shown on this page include any changed distributions that have not been authorized or approved. To see the distributions that are currently in effect when changes are pending, click on the In Eff button at the bottom of the page. This displays a non-editable version of the Faculty & Staff Commitment Summary page that shows the distributions currently in effect for the selected individual.

Tip! You can display comments on the changes shown on the Faculty & Staff Commitment Summary page by clicking the View Cmt button.

Displaying a Person’s Commitment Summary

To display a person’s Commitment Summary page, you must locate the person on the General Browse page, and click the Edit Summary button to display the Faculty & Staff Commitment Summary page.

Note: If you search for records using the Project Browse page, you will not see the Faculty & Staff Commitment Summary page; instead, you will see the tabbed detail pages for which you are authorized. See “Changing Project Distributions,” on page 151 for information on how to make distribution changes on the detail pages from the Project Browse.

To display a person’s commitment summary:

1. On the General Browse page, create a current view as described in “Entering Search Criteria to Create the Current View,” on page 28.

   Tip! The more search criteria you use, the smaller the resulting list will be, and the easier it will be to locate the person you want.

2. In the Personnel List on the General Browse page, use the scroll bar, if needed, to locate the person whose commitments you want to see.
3. Click the Edit Summary button on the line that contains the person’s name. The Faculty & Staff Commitment Summary page is displayed.

Alternatively, you can work your way through all the records displayed on the Personnel List of the General Browse page by clicking the Next and Prev buttons on the Faculty & Staff Commitment Summary page. This is very useful when you are using the General Browse page to display your work list.

What’s on the Faculty & Staff Commitment Summary Page?

The Faculty & Staff Commitment Summary page contains a summary of commitment data for one faculty or staff member. At the top left, in the yellow banner, the person’s name, emplID, and department are displayed. Under the identification area, the earnings types for commitments are listed, by fiscal year.

Depending on the default settings for your user profile (see “Changing Your User Profile,” on page 21 for information on the user profile), one or more fiscal years may be expanded to show the support and earnings types, or they may all be collapsed. Rows that are collapsed are indicated by a plus mark:

You can click on the plus mark to expand a collapsed row into multiple rows for each earnings type.

Note: When you click on the plus mark, the display is expanded upward to show the additional data.
To collapse the rows, click on the minus symbol ▼ at the bottom of the expanded rows.

When the fiscal years are expanded, each earnings type is a link to a page where you can specify the details about that earnings type, including adding and removing periods, and changing project/grant distributions.

The Faculty & Staff Commitment Summary page is divided into four major column groups, a yearly total column and one column each for Summer, Fall, and Spring. When the fiscal year is collapsed, only the total commitment and duty time are displayed in each column.

When a fiscal year is expanded, the commitment and duty time percent are displayed for each earnings type in each column.
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Click on the links in the first column to enter distribution changes for a particular earnings type, including adding or removing a distribution period, or changing project/grant distributions.

At the bottom of the page are a series of buttons (you may need to scroll down to see them).

**Copy From**
Use to copy distribution data from the displayed person’s record.

**Copy To**
Use to paste copied data for a selected year into the displayed person’s record.

**View Cmt**
Use to display status and comments on the displayed person’s record.

**Quit Edit**
Use to return to the General Browse page without saving or submitting changes. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

**In Eff**
Use to display the distributions currently in effect for the displayed person. To return to the edit page, click the Edit button.

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<table>
<thead>
<tr>
<th>Year</th>
<th>Commitment</th>
<th>Duty %</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2005</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>FY2006</td>
<td>150,000.00</td>
<td>100.00</td>
</tr>
</tbody>
</table>

**Important!** Do not use the browser’s Back button to return to a previous page. This leaves the record in Edit mode, locking out all other users until either you return to the record or the system resets overnight. If the system resets the record, any changes will be lost.
Save

Use to temporarily save changes without submitting them for approval. The record will be locked to other users for 24 hours. After that, your changes will be lost only if another user makes changes that interfere with your changes.

**Tip!** Clicking Save returns you to the browse page.

Partial

Use to approve changes only at your highest level of approval authorization. You must enter a comment explaining the changes.

**Tip!** It is not necessary to save changes before submitting them for approval.

Submit

Use to approve changes at all levels for which you are authorized, and submit changes for other approvals. You must enter a comment explaining the changes.

**Tip!** It is not necessary to save changes before submitting them for approval.

Disappr

Use to disapprove changes. You must enter a comment explaining why the changes are not approved.

Help

Use to display the help topic that introduces or explains the displayed page. This button appears on most pages. If you need more help than is provided in the help topic, click the Contents button at the top of the topic page to display the help contents.

Prev

Use to display the previous record on the Personnel List. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

Next

Use to display the next record on the Personnel List. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.
Adding and Deleting Distribution Periods

Usually, except in the case of summer salaries for faculty, you would not add or delete an earnings period for a commitment for a faculty or staff member. However, you can add, change, or delete distribution periods for project/grant distributions. Each earnings type must have at least one distribution period, so if only one distribution period exists for an earnings type, it cannot be deleted.

Many faculty and staff encumbrances are open ended. This is indicated in the Distribution area by a Period End date of 12/31/2999. If you want to add a distribution period for the fiscal year you are updating, click the Add Yr End button. A period will be added from July through June of the following year.

If you want to add a distribution period shorter than a year, use the Add Period button.

To add distribution periods for project/grant distributions:

1. From the General Browse page, select the person you want to update by clicking the Edit button on that line. The Faculty & Staff Commitment Summary page appears.

2. Locate the earnings type that needs to be redistributed, and click on the link to open the page for that earnings type.

3. To add a distribution period for the fiscal year, click on the Add Yr End button in the Distribution area, and continue with Step 6.

   To add a shorter distribution period, click the Add Period button. The Add Period window is displayed.

   Tip! You can cancel the add by clicking on the Cancel button.

4. In the Begin Date field, type the starting date for the new time period using the format m/d/yyyy, or double click in the field to display a calendar where you can select the date.
5. Click on the Finish button (or press the Tab and then the Enter key). The page will be redisplayed with the new distribution period using the percentages from the previous period. The end date of the new period is what was the end date of the previous period, and the end date of the previous period is the day before the beginning date you entered for the new period.

6. If you know the distribution percentage to be charged to the project/grant in the new period, type the percentage of the overall commitment to be charged to the project/grant (50% is entered as 50.00) in the Distrib % field.

   If you know the dollar amount to be charged to the project/grant:
   
a) Click the $ checkbox to open the Distrib Amt field for input.
   
b) Type the amount to be charged to this project/grant in the Distrib Amt field.

   Note: If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions before you click the Calculate button.

7. Click the Calculate button to calculate the remaining values for all of the project/grants.
8. When the distributions are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another earnings type by clicking on the appropriate tab.

9. When you are finished with changes for this faculty or staff member, click the Submit button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To delete an existing distribution period:**

1. From the General Browse page, select the person you want to update by clicking the Edit button on that line. The Faculty & Staff Commitment Summary page appears.

2. Locate the earnings type for which a distribution period needs to be deleted, and click on the link to open the page for that earnings type.

3. In the Distribution area, click on the Del Period button. The Delete Period window is displayed.

   **Note:** If there is only one period, the Del Period button will be dimmed, since you cannot delete that period.

   **Tip!** You can cancel this action by clicking on the Cancel button.

4. In the Begin Date field, select the beginning date of the period you want to remove from the drop-down list, and click the Finish button. You are returned to the page, and the distribution period is deleted. The previous distribution period is extended to the date when the deleted period ended, and the support commitments are recalculated.

   **Note:** If the support in the remaining period(s) is distributed to the wrong project/grant(s), you will need to change the amounts allocated to each project/grant. See “Adding or Changing Project/Grant Distributions,” on page 126 for instructions.

5. When the commitments are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another earnings type by clicking on the appropriate tab.
6. When you are finished with changes for this faculty or staff member, save or submit your changes as described in “Saving and Authorizing Changes,” on page 166.
Adding or Changing Project/Grant Distributions

Project/grant distributions can be added or changed by users who are authorized for that project/grant, or by users who are authorized for any department. If the user who makes the changes is not authorized for that project/grant, the changes are submitted for approval by the owner of the project/grant.

**Important!** You will not be able to enter distributions for projects that are closed (that is, before the project open date or after the project close date). If the current date is after the project close date, you cannot enter distributions to that project, because it would require booking the changes after the close date.

While you can change existing project/grant distributions, you cannot change the project/grant numbers. If an incorrect project/grant has been charged, you must zero out the distributions charged to that project/grant, click the Clean Data button to remove the project/grant, and then add the correct project/grant and it’s distributions.

**Note:** The Clean Data button will not remove the default project/grant line, even if it contains only zeros.

When you add a non-default project/grant, the default project/grant is adjusted automatically, so the total commitment remains the same.

If there are multiple project/grants, you can enter a value in the line for one project/grant and check the Bal checkbox in another line to distribute the remaining commitment to that project/grant, rather than to the default project/grant.

**Note:** If you have only project/grant authorization, you will not see project/grants other than the ones for which you are authorized. See “Changing Project/Grant Distributions,” on page 154 for instructions.

If you need to add a distribution period to redistribute the charges (for example, when a project starts or closes), or if you need to remove a distribution period, see “Adding and Deleting Distribution Periods,” on page 122 for instructions.
When adding a project/grant, you can look for the project/grant number using any of the following search criteria:

- The first several digits of the project/grant number. The resulting project/grant list will include only those project/grant numbers that begin with the specified digits.
- The department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.
- Sponsored projects. If you check this box, only sponsored projects will be listed.
- Primary Investigator. All projects with the specified P.I. will be listed.
- Fund. All project/grants that use this fund code will be listed.

If you select multiple search criteria, the resulting list will include only those project/grant numbers that match all of the specified criteria.

To add a project/grant to an existing period:

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.
2. Locate the earnings type that needs to be redistributed to a different project/grant, and click on the link for that earnings type.
3. On the earnings type page, click the Add P/G button in the Distribution area. The Find Project Grant window is displayed.
4. Enter the desired search criteria:

   **Begin**

   Enter the first several digits of the project/grant number. The resulting project/grant list will include only the project/grant numbers that begin with the specified digits. This is useful if you want to search for all of your 4xxx accounts, for example.

   **Dept**

   Enter the department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.

   If you are authorized for only one department, that department will be used as the default search criteria.

   **Sponsored Project**

   Click on this checkbox to list only sponsored projects (projects in the Fund 40 or 60 series).

   **P. I.**

   Select the primary investigator from the drop-down list. All projects with the specified P. I. will be listed. If you select **All**, the list will not be filtered by P. I.

   **Fund**

   Select the desired fund code from the drop-down list. All project/grants that use this fund code will be listed. If you select **All**, the list will not be filtered by fund code.

5. Select the desired project/grant number by scrolling through the list and clicking on the desired project/grant. Click the Finish button to add the new project/grant number.

**Note:** If the desired project/grant is not included in the list, contact the Controller’s Office.
The earnings type page is redisplayed with a new line for the new project/grant.

**Note:** If you selected a project/grant that is closed for any portion of the distribution period, the project/grant is added, but the distribution period ends on the date when the project/grant is closed. Because the closed project/grant **must** have Distrib Amts of 0.00 (zero) in the period for which it is closed, an additional distribution period is added with zero amounts that cannot be changed for the closed project.

6. If you know the distribution percentage to be charged to the new project/grant:
   a) Type the percentage of the overall commitment to be charged to the project/grant (50% is entered as 50.00) in the Distrib % field.

   **Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.

   b) Click the Calculate button to calculate the Distrib Amt, based on the Distrib % value.

If you know the dollar amount to be charged to the new project/grant:
   a) Click the $ checkbox to open the Distrib Amt field for input.
   b) Type the amount to be charged to this project/grant in the Distrib Amt field.

   **Note:** If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions **before** you click the Calculate button.

   c) Click the Calculate button to calculate the Distrib % values for all of the project/grants.

7. When the distributions are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.
8. When you are finished with changes for this faculty or staff member, click the Submit button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

To change project/grant distributions without adding a new period:

1. From the General Browse page, select the person you want to update by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that needs to be redistributed, and click on the link for that earnings type.

3. To change the distributions by percentage, type the distribution percentage to be charged to the project/grant (50% is entered as 50.00) in the Distrib % field.

   To change the distributions by dollar amount:

   a) Click the $ checkbox to open the Distrib Amt field for input.

   b) Type the amount to be charged to this project/grant in the Distrib Amt field.

   Note: If there are multiple project/grants, and you want to distribute the remaining commitment to a project/grant other than the default project/grant, check the Bal checkbox for the project/grant that is to receive the balance of the distributions.

4. Click the Calculate button to calculate the Distrib % values for all of the project/grants.

5. When the distributions are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

6. When you are finished with changes for this faculty or staff member, save or submit your changes as described in “Saving and Authorizing Changes,” on page 166.
To delete a project/grant from a distribution period:

1. From the General Browse page, select the person you want to update by clicking the **Edit Summary** button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

2. Locate the earnings type that needs to be redistributed, and click on the link for that earnings type.

3. Type zeros in the **Distrib %** field for the project/grant you want to delete.

   **Note:** To distribute the remaining commitment to a project/grant other than the default project/grant, check the **Bal** checkbox for the project/grant that is to receive the balance of the distributions.

4. Click the **Calculate** button to zero out the remaining fields for the project/grant. The distributions will be re-allocated to the default project/grant, unless you check the **Bal** checkbox for another project/grant.

5. Click the **Clean Data** button to remove the zeroed out project/grant line.

6. When the distributions are correct, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another internal support type by clicking on the appropriate tab.

7. When you are finished with changes for this faculty or staff member, click the **Submit** button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the **Save** button. The record will be locked to other users for 24 hours.
Adding Faculty Summer Salaries

Faculty summer salaries can be paid at a rate of up to 2.5 ninths of the faculty member’s regular academic year base pay. Before the Office of the Dean of the Faculty will approve a summer salary, you must allocate the distributions to one or more open, valid accounts with sufficient funding to cover the charge. For a full explanation of the policies on faculty summer salaries, see the Guide for Academic Department Chairs and Managers, located under Guide to Policies, Publications, and Reports on the Office of the Dean of the Faculty web page.

**Tip!** You do not need to calculate what a ninth of the salary would be for a faculty member. The single summer month salary amount is displayed on the DOF Curr Appr line.

No summer salary will be paid until the Office of the Dean of the Faculty approves it. You can see whether the summer salary has been approved on the DOF Curr Appr line. If the summer salary has been approved, the Distrib Mths and Distrib Amt will reflect the salary that has been approved.

The Office of the Dean of the Faculty requires all faculty who receive summer pay to certify their time and effort on the project/grants to be charged. If you have department authorization, you can print the Certification of Effort form with the summer salary distributions from the Fac Summ page. Have the faculty member and the department chair sign the form, and keep the completed form as a record in case it is needed later for a project audit.
If a project cannot pay the full salary for the required amount of time, an offset is temporarily created. If your department cannot cover the offset from another project, you can decrease the amount paid by clicking the zero offset button. You cannot approve an amount over what will be paid by the project unless the department is providing the additional funds.

**Important! A person with project authorization may submit a summer salary with an offset, which must be re-distributed to another project and then approved by the department. If you have department authorization, you cannot submit a summer salary with an offset.**

If you add a summer salary from the Project Browse detail pages and you have department-level authorization, you must save the changes, and then reopen the record from the General Browse page to submit the changes.

**To add summer salaries for faculty members:**

1. From the General Browse page, select the faculty member you want to update by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

2. Click on the Summer Salary link to display the Faculty Summer Salary Distribution page. If no summer salary has been previously entered for this faculty member, there will be two distribution periods, one for the month of July and one for August.

3. Click the Add P/G button to display the Find Project Grant window.

4. Locate the project/grant number using the search fields on the Find Project/Grant window. (If you need instructions on using the Find Project/Grant window, see “Using the Find Project/Grant Window,” on page 172.)
5. Click the Finish button to add the project/grant. The Distrib Mths field will be opened for input.

**Note:** If the project/grant you selected is for a project that will be closed at any point during the distribution period, another period will be added automatically beginning on the day after the project is closed. The P/G Name will begin with the word Closed - for that period, and you will not be able to enter any amounts on that line. However, you will be able to enter amounts for the period when the project is open.

6. If more than one project/grant will be charged for the summer salary, repeat Step 3 through Step 5, as needed.

7. If you know the number of months work to be charged to the project/grant, enter the number of summer months to be charged in each period to the new project/grant in the Distrib Mths field in each period, and continue with Step 8. The maximum total number of months for which a faculty member can be paid a summer salary is 2.5.

**Note:** One month in the Distrib Mths field equals one ninth of the regular faculty salary.

**Tip!** If you are entering partial month values, you will need to include five decimal positions to ensure that calculations will total correctly.

If you know the dollar amount to be charged to the project/grant:

a) Click the $ checkbox to open the Distrib Amt field for input.

b) Type the amount to be charged to this project/grant in the Distrib Amt field.

**Note:** If summer salary is to be paid in both July and August, it is preferred that you split the payments evenly over the two months, unless an account is closed in one of the months, or another reason prevents even payment.

**Tip!** If you have a complex distribution set, it is recommended that you calculate the amounts offline, and enter the dollar amounts and click the Calculate button to derive the month values. Otherwise, rounding could cause discrepancies in the penny amounts displayed, although this will not affect the bottom line charges to projects.
8. Click the Calculate button to calculate the remaining values, based on the values you entered.

*Tip! If you have project/grants listed that are not used, click the Clean Data button to remove them.*

**Note:** If you have corrected an offset, you must click the Zero Offset button to remove the offset funding. Otherwise, you will not be able to save the record.

9. If the project/grant(s) are the same in both periods, and will be charged the same number of months in each period, click the Jul-->Aug button to copy the July entries to August, and combine the two months.

*Tip! If you need to split the periods apart again, click the Split button. The period will be divided into the two summer months.*

10. Display and print the certification form:

   a) Click the Cert Form button to display the Faculty Summer Salary Certification of Effort Form.

   b) From the menu, select File, and then Print to print the form.

   c) Have the faculty member and department chair sign the form, and save it for your records in case of a project audit.

   d) Click the Close button to close the window and return to the Fac Summ page.

11. When you have made all the changes you need to make on this page, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another earnings type by clicking on the appropriate tab.
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12. When you are finished with changes for this faculty member, click the Submit button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.

**Note:** Fund 10 or 20 may only be used for up to 2 months of salary. If you attempt to enter more than 2 months on a Fund 10 or 20 project/grant, an error will occur, and the record will not be saved until you reduce the Fund 10 or 20 distribution.

A warning message is always displayed for the use of Fund 10 or 20 project/grants for summer salary. If you have questions about the use of these funds, contact the Office of the Dean of the Faculty.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Note:** If you add a summer salary from the Project Browse detail pages but you have department-level authorization, you must save the changes, and then reopen the record from the General Browse page to submit the changes.

When the Summary page is redisplayed, the Pend Code column indicates what type of approval, if any, is still required. For an explanation of the Pending Status codes, see Step 2, on page 29, or see the Entering Summer Distributions quick reference card.

**Important!** No summer salary will be paid until the Office of the Dean of the Faculty approves it. In addition, if HR does not have an I-9 on file for the faculty member by the begin date of the summer pay period, he or she will not be paid.

To redistribute approved summer salary amounts:

1. From the General Browse page, select the faculty member you want to update by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

2. Click on the Summer Salary link to display the Faculty Summer Salary Distribution page.
3. To add a new project/grant, click the Add P/G button to display the Find Project Grant window. For instructions on using the Find Project Grant window to locate and select a project/grant, see “Using the Find Project/Grant Window,” on page 172.

4. To redistribute an amount from one project grant to another displayed project/grant:

   a) On the line for the project/grant whose encumbrance should be changed, enter the new amount, either by entering the Distrib Mths value or by clicking the $ checkbox and entering the reduced Distrib Amt.

   b) On the line for the project/grant that will receive the balance of the encumbrance, click the MTA (Match to Approved) checkbox. This will adjust this project/grant to the remaining approved summer salary encumbrance.

   c) Click the Calculate button. The total will still match the DOF Curr Appr line, but the amounts will be redistributed across the project/grants.

5. Display and print the certification form:

   a) Click the Cert Form button to display the Faculty Summer Salary Certification of Effort Form.

   b) From the menu, select File, and then Print to print the form.

   c) Have the faculty member and department chair sign the form, and save it for your records in case of a project audit.

   d) Click the Close button to close the window and return to the Fac Summ page.

6. When you have made all the changes you need to make on this page, you can return to the Faculty & Staff Commitment Summary page by clicking the Summary tab, or select another earnings type by clicking on the appropriate tab.

7. When you are finished with changes for this faculty member, click the Submit button on the Faculty & Staff Commitment Summary page to save your changes and submit them for approval.
Tip! After the total summer salary amount has been approved by the Office of the Dean of the Faculty, redistributing the encumbrances without changing the total does not require central office approval. However, changing the total summer salary will require central office approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
You can copy distributions from one faculty or staff member to another. Copying distributions is a two-step process, like a Windows copy and paste:

- First, you copy from the Faculty & Staff Commitment Summary page for the person with the distributions you want. All the distributions on the page are copied, even if they are not expanded.

- Then you copy those distributions to the person who requires the same distributions, specifying which year’s distributions to copy. If you are copying from a record with pending changes, you may specify whether you want to copy the distributions currently in effect, or the pending changes.

To copy distributions:

1. From the General Browse page, select the person you want to copy from by clicking the Edit Summary button on that line. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

2. If necessary, make any changes that are required for both people on the appropriate earnings type page for this person.

3. Click the Copy From button. When the message Copy From has been set up successfully appears, click the OK button to continue. All distributions for the selected person have been copied.

4. Return to the Personnel list on the General Browse page by clicking the Save or Submit button if you have made changes, or the Quit Edit button if you have made no changes.

5. Select the person who should have the same distributions by clicking the Edit Summary button on the line for that person. The Faculty & Staff Commitment Summary page appears, showing the selected person's distributions.

6. Click the Copy To button. The Copy To window is displayed.

7. Verify that you are copying the information from the person you copied from in Step 3.
8. Select the academic year of the distributions you want to copy, by clicking on the radio button before the year.

9. If you are copying from a record with pending changes, select the distributions you want to copy by clicking on the radio button.

   - **In Effect** to copy the distributions currently in effect
   - **Pending** to copy the distributions that are pending approval

10. Click the Finish button to copy the distributions.

11. If there are some differences in the distributions, make the necessary changes on the appropriate earnings type page.

12. When you are finished with changes for this person, save or submit the changes, as described in “Saving and Authorizing Changes,” on page 166.
Working with the Project Browse

If you have only project input or approval authorization, when you sign onto Labor Accounting, the Project Browse page is displayed. Working from the Project Browse page is a little different from working from the General Browse page:

✧ On the Project Browse page, you search based on project/grant, and you may use fiscal year or date range, or a name or EmplID as additional search criteria.

✧ To add a person to a project, you specify the project/grant number and the person’s EmplID (see “Adding a Person to a Project,” on page 160 for detailed instructions).

✧ The Project Summary is displayed on the Project Browse page, listing the personnel charged to the project. You select records to edit in the same way as on the General Browse page, but on the person’s record, you will see only the information for the specified project (unless you click the All P/G button and are authorized to see other projects).

Note: If you have only project authorization, you cannot add a vacancy. Ask someone with department authorization to create the vacancy. Once the vacancy is created, you can distribute encumbrances for the vacancy to your projects.

This chapter contains information on locating and editing records from the Project Browse page.
If you have project/grant access, you can display a summary of project distributions for all personnel charged to a project, and edit those distributions from the Project Browse page. If you have only project/grant access, the Project Browse page is displayed when you sign onto Labor Accounting. If you also have higher level access, you can access the Project Browse page from the General Browse page, by clicking the Proj Browse button.

To display project-related commitments on the Project Browse page, you must first specify the project for which you want to review commitments. You can locate the project grant by number, using the Find Project Grant window. You can also restrict the project summary to a specific date range or employee, if desired. You can then review a summary of the commitments on the Project Browse page.

If a person you are not authorized to see has been charged to the project, but the charge has not been fully approved, the person is listed on the summary with dashes replacing the amounts. When the charge is approved, the actual amounts charged to the project will be displayed.

To change the encumbrances, click on the Edit button at the end of the line for the person whose encumbrances you want to change. When you edit a record from the Project Browse page, only the pages for earnings types that can be charged to a project are displayed.
What’s on the Project Summary?

The Project Summary area of the Project Browse page lists the personnel who are charged to the selected project, and summarizes the total amount charged for each person in the current, previous, and budget year of the project/grant, as well as the year prior to the previous year. The total commitment for each year is displayed at the bottom of each column.

If a person you are not authorized to see has been charged to the project, but the charge has not been fully approved, the person is listed on the project summary, with dashes replacing the amounts. When the charge is approved, the actual amounts charged to the project will be displayed.

Each person charged to the project is listed by both name and employee ID (EmplID), and their staff class and home department is displayed.

Creating and Using the Project Summary

The project summary is displayed using the Project Browse page. Once you have created the project summary, you can edit the project distributions for each person listed.

You create the project summary by selecting values in the Search Criteria panel. In this panel, you can also see a list of projects that need approval, and you can search for a person you need to add to your project.
To display a project listed in the Need Approval list:

1. On the Project Browse page, locate the project/grant number in the Need Approval list.

2. Highlight the project number in the list, and press the Ctrl + C keys to copy it.

3. Click in the Project Grant field, and press the Ctrl + V keys to paste the project/grant number into the field.

4. Click the Search button to display the project summary. The names in red are the people whose project funding needs to be approved.

To display a project on the Project Browse page:

1. If you are not already on the Project Browse page, and you have department or central office approval authority, click on the Proj Browse button at the bottom of the General Browse page. (Scroll down, if necessary to see the buttons.) The Project Browse page is displayed.
2. In the Search Criteria panel, type the 7-digit project/grant number, if you know it, in the Project Grant field, or click the Find button to use the Find Project/Grant window to locate the project/grant number. For instructions on using the Find Project/Grant window, see “Using the Find Project/Grant Window,” on page 172.

**Important!** The Project/Grant is required, regardless of any other criteria entered on this page.

**Note:** If you search for a project/grant that is the default project/grant for an earnings type in your department, you will be able to see the data on the detail pages, but you will not be able to edit the data for the default project/grant. However, you will be able to add or remove other projects for which you are authorized.

3. If you want to limit the display to a particular date range, select the Fiscal Year or Date Range for which you want to see project commitments:

   - To select one or more years, click on the checkbox before (to the left of) each year you want to include. Only individuals who have project commitments during the selected year(s) will be displayed on the Project Browse page.

   *Tip!* Fiscal years are known by the ending year, so the 05-06 year would be known as fiscal year 2006.

   - To select a date range, select the year and month from the drop-down list in the From and To fields.

   Only individuals who have project commitments during the selected period will be displayed on the Project Browse page.

**Note:** The Project Browse page will include data for up to 4 fiscal years: the current, previous, and budget year, and the year prior to the previous year.

4. To limit selections by name or ID, enter values in the Name & Emplid area:
Locating Personnel on the Project Browse Page

- To limit your view to one or more people whose names begin with the same letters, enter as much of the last name as you know in the Last field, and as much of the first name as you know in the First field.

- To limit your view to a single person, enter the person’s Employee ID (their PeopleSoft EmplID) in the ID field.

**Tip!** You can find a person’s ID by name, department, and other criteria by clicking the Find button next to the ID field.

5. To display only vacancies, select **Vacancies Only** from the drop-down list in the Special field.

6. When you have entered all the desired search criteria, click the Search button or press the Enter key to display the selected commitments for the specified project.

   To reset the values in the Search Criteria panel to the last search values used, click the Reset button. To clear all values in the Search Criteria panel, click the Clear button.

7. To edit a person’s project distributions, click on the Edit button at the end of the line that contains the person’s name. The appropriate detail pages are displayed for the selected person.
Chapter 6: Working on Projects

Editing from the Project Browse Page: Buttons

When you edit a person’s distributions from the Project Browse page, the Summary pages are not displayed. Instead, you will see the tabbed detail pages that apply for the individual you are editing. Because the Summary page is not available, the following buttons are displayed on the detail pages:

- **View Cmt**  
  Use to display comments on the displayed person’s record, and status information from PeopleSoft HR.

- **Quit Edit**  
  Use to return to the Project Browse page without saving or submitting changes. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

  *Important!* **Do not** use the browser’s Back button to return to a previous page. This leaves the record in Edit mode, locking out all other users until either you return to the record or the system resets overnight. If the system resets the record, any changes will be lost.

- **In Eff**  
  Use to display the distributions currently in effect for the displayed person. To return to the edit page, click the **Edit** button.

- **Save**  
  Use to temporarily save changes without submitting them for approval. The record will be locked to other users for 24 hours. After that, your changes will be lost only if another user makes changes that interfere with your changes.

  *Tip!* Clicking **Save** returns you to the browse page.

- **Submit**  
  Use to approve changes at all levels for which you are authorized, and submit changes for other approvals.

  For summer salaries, if you have departmental authorization as well as project authorization, you **must** submit the summer salary from the General Browse page. Save the changes here, and then re-open and submit from the General Browse page.

  *Tip!* It is **not necessary to save changes before submitting them for approval.**
### Help

Use to display the help topic that introduces or explains the displayed page. This button appears on most pages. If you need more help than is provided in the help topic, click the Contents button at the top of the topic page to display the help contents.

### Prev

Use to display the previous record on the Project Browse page. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

### Next

Use to display the next record on the Project Browse page. If you have made changes, a warning will be displayed, giving you the option to continue without saving, or to return to the page and save your changes.

In addition to these buttons, the buttons typically found on the detail pages are also displayed:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add Period</strong></td>
<td>Use to add a distribution period for less than the full fiscal year.</td>
</tr>
<tr>
<td><strong>Add Yr End</strong></td>
<td>Use to add a distribution period for the fiscal year.</td>
</tr>
<tr>
<td><strong>Del Period</strong></td>
<td>Use to delete a distribution period. If there is only one distribution period, this button will be dimmed.</td>
</tr>
<tr>
<td><strong>Add P/G</strong></td>
<td>Use to add a project/grant for which you have authorization.</td>
</tr>
<tr>
<td><strong>Calc</strong></td>
<td>Use to recalculate values after making changes. This also temporarily saves your changes, so you don’t have to stop and save them manually.</td>
</tr>
<tr>
<td><strong>Clean</strong></td>
<td>Use to remove blank or zeroed lines.</td>
</tr>
<tr>
<td><strong>Reset</strong></td>
<td>Use to return values to the last values that were sent to the database. This can be used until you click a button or perform an action that interacts with the database.</td>
</tr>
</tbody>
</table>
There are also a few buttons specific to the Project Browse environment:

- **All P/G**
  - Use to display all project/grant distributions for the individual. You will still see only those project/grants for which you are authorized.

- **BRWS P/G**
  - Use to return the display to only the project/grant you selected on the Project Browse page.

- **20xx**
  - Three buttons labeled with the 4-digit years for the prior, current, and budget year, respectively. Use to display the distributions for the appropriate year.

**Note:** The year button for the currently displayed year is always dimmed.
Changing Project Distributions

You can change distributions for the projects for which you are authorized by adding distribution periods or changing the amount or percent of the distributions that are already there. For example, you may want to add a distribution period when a project is closing, to remove distributions for that project.

Adding and Deleting Distribution Periods

You can add, change, or delete distribution periods for project/grant distributions. Each earnings type must have at least one distribution period, so if only one distribution period exists for an earnings type, it cannot be deleted.

Many faculty and staff encumbrances are open ended. This is indicated in the Distribution area by a Period End date of 12/31/2999. If you want to add a distribution period for the fiscal year you are updating, click the Add Yr End button. A period will be added from July through the following June, or for faculty, from September through the following June.

Note: For faculty members, the REG page shows a separate summer period. You cannot change the project distribution for the summer salary on the REG page; summer salary distributions are maintained on the FSS page.

If you want to add a distribution period shorter than a year, use the Add Period button.

To add distribution periods for project/grant distributions:

1. From the Project Browse page, select the person you want by clicking the Edit Summary button on that line. The earnings type pages are displayed.

2. Click on the page tab for the earnings type you need to change.

3. To add a distribution period for the fiscal year, click on the Add Yr End button in the Distribution area, and continue with Step 6.
To add a shorter distribution period, click the Add Period button. The Add Period window is displayed.

**Tip!** You can cancel the add by clicking on the Cancel button.

4. In the *Begin Date* field, type the starting date for the new time period using the format *m/d/yyyy*, or double click in the field to display a calendar where you can select the date. (See “Using the Calendar Window,” on page 171 for more information.)

5. Click on the Finish button (or press the Tab and then the Enter key). The page will be redisplayed with the new distribution period using the percentages from the previous period. The end date of the new period is what was the end date of the previous period, and the end date of the previous period is the day before the beginning date you entered for the new period.

6. To change the distributions based on the FTE percentage, type the percentage of the overall commitment to be charged to the project/grant (50% is entered as **0.500**) in the *Distrib FTE* field.

To change distributions based on the dollar amount to be charged to the project/grant:

a) Click the $ checkbox to open the *Distrib Amt* field for input.

b) Type the amount to be charged to the project/grant in the *Distrib Amt* field.
7. Click the Calculate button to calculate the remaining values for all of the project/grants.

**Note:** If you are adding an amount to your project/grant, the same amount will be subtracted from the default project/grant. If you are reducing an amount for your project/grant, the default project/grant will be incremented by the same amount.

8. When the distributions are correct, you can select another earnings type by clicking on the appropriate tab, or work on another year by clicking on the appropriate year button.

9. When you are finished with changes for this individual, click the Submit button at the bottom of the page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**To delete an existing distribution period:**

1. From the Project Browse page, select the person you want to update by clicking the Edit button on that line. The tabbed earnings type pages are displayed.

2. If the top page is not the one you need, click on the tab to open the page for the desired earnings type.

3. Click on the Del. Period button. The Delete Period window is displayed.

**Note:** On the REG page for faculty, two distribution periods are always displayed, one for summer and one for the academic year. If these are the only two periods displayed, you cannot delete either period.

**Tip!** You can cancel this action by clicking on the Cancel button.
4. In the Begin Date field, select the beginning date of the period you want to remove from the drop-down list, and click the Finish button. You are returned to the page, and the distribution period is deleted. The previous distribution period is extended to the date when the deleted period ended, and the support commitments are recalculated.

**Note:** If the support in the remaining period(s) is distributed to the wrong project/grant(s), you will need to change the amounts allocated to each project/grant for which you are authorized. See “Changing Project/Grant Distributions,” on page 154 for instructions.

5. When the commitments are correct, you can select another earnings type by clicking on the appropriate tab, or work on another year by clicking on the appropriate year button (on the bottom right).

6. When you are finished with changes for this individual, click the Submit button at the bottom of the page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Changing Project/Grant Distributions**

Project/grant distributions can be added or changed by users who are authorized for that project/grant, or by users who are authorized for any department. If the user who makes the changes is not authorized for that project/grant, the changes are submitted for approval by the owner of the project/grant.

**Important!** You will not be able to enter distributions for projects that are closed (that is, before the project open date or after the project close date). If the current date is after the project close date, you cannot enter distributions to that project, because it would require booking the changes after the close date.

While you can change existing project/grant distributions, you cannot change the project/grant numbers. If your project/grant has been charged incorrectly, you must zero out the distributions charged to the project/grant, and click the Clean button to remove the line. If you are authorized for the correct project/grant, you can then add it and enter the correct distributions.
When adding another project/grant for which you are authorized, you can look for the project/grant number using any of the following search criteria:

- The first several digits of the project/grant number. The resulting project/grant list will be limited to project/grants that begin with the specified digits.
- The department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.
- Sponsored projects. If you check this box, only sponsored projects will be listed.
- Primary Investigator. All projects with the specified P.I. will be listed.
- Fund. All project/grants that use this fund code will be listed.

If you select multiple search criteria, the resulting list will include only those project/grant numbers that match all of the specified criteria.

**Note:** When working from the Project Browse pages, you will not be able to add a project/grant for which you are not authorized. The Find Project Grant window will only list projects for which you are authorized.

Although you will not see it on the project browse detail pages, when you add or remove distributions for your project/grant, the default project/grant is adjusted automatically, so the total commitment remains the same.

**To change existing project/grant distributions:**

1. From the Project Browse page, select the person you want by clicking the Edit Summary button on that line. The earnings type pages are displayed.
2. If the top tab is not the one you need to change, click on the page tab for the earnings type you need to change.
3. To change the distributions by percentage, type the FTE percentage to be charged to the project/grant (50% is entered as 0.500) in the Distrib FTE field.

   To change the distributions by dollar amount:

   a) Click the $ checkbox to open the Distrib Amt field for input.
b) Type the amount to be charged to this project/grant in the *Distrib Amt* field.

4. Click the Calculate **Calculate** button to calculate the remaining values for all of the project/grants.

   **Note:** If you are adding an amount to your project/grant, the amount will be subtracted from the default project/grant. If you are lowering an amount for your project/grant, that amount will be added to the default project/grant.

5. When the distributions are correct, you can select another internal support type by clicking on the appropriate tab, or another year by clicking on the appropriate year button.

6. When you are finished with changes for this individual, click the Submit **Submit** button at the bottom of the page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save **Save** button. The record will be locked to other users for 24 hours.

**To add another project/grant:**

1. From the Project Browse page, select the person you want by clicking the Edit Summary **Edit Summary** button on that line. The earnings type pages are displayed.

2. If the top tab is not the page you need to change, click on the page tab for the earnings type you need to change.

3. Click the Add P/G **Add P/G** button. The Find Project Grant window is displayed.

   **Note:** You will not be able to select a project/grant for which you are not authorized when working from the Project Browse pages. The Find Project Grant window will only list projects for which you are authorized.
4. Enter the desired search criteria:

**Begin**

Enter the first several digits of the project/grant number. The resulting project/grant list will be limited to project/grants that begin with the specified digits.

**Dept**

Enter the department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department.

If you are authorized for only one department, that department will be used as the default search criteria.

**Sponsored Project**

Click on this checkbox to list only sponsored projects (projects in the Fund 40 or 60 series).

**P. I.**

Select the primary investigator from the drop-down list. All projects with the specified P. I. will be listed. If you select ---- All -----, the list will not be filtered by P. I.

**Fund**

Select the desired fund code from the drop-down list. All project/grants that use this fund code will be listed. If you select ---- All -----, the list will not be filtered by fund code.

5. Select the desired project/grant number by scrolling through the list and clicking on the desired project/grant. Click the Finish button to add the new project/grant number.

**Note:** If the desired project/grant is not included in the list, contact the Controller’s Office.
The earnings type page is redisplayed with a new line for the new project/grant.

**Note:** If you selected a project/grant that is closed for any portion of the distribution period, the project/grant is added, but the distribution period ends on the date when the project/grant is closed. Because the closed project/grant must have Distrib Amts of 0.00 (zero) in the period for which it is closed, an additional distribution period is added with zero amounts that cannot be changed for the closed project.

6. If you know the FTE percentage to be charged to the new project/grant:
   a) Type the percentage of the overall commitment to be charged to the project/grant (50% is entered as 0.500) in the Distrib FTE field.

   If you know the dollar amount to be charged to the new project/grant:
   a) Click the $ checkbox to open the Distrib Amt field for input.
   b) Type the amount to be charged to this project/grant in the Distrib Amt field.

   **Note:** If you add a summer salary from the Project Browse detail pages but you have department-level authorization, you must save the changes, and then reopen the record from the General Browse page to submit the changes.

7. Click the Calculate button to calculate the remaining values for all of the project/grants.

8. When the distributions are correct, you can select another earnings type by clicking on the appropriate tab, or work on another year by clicking on the appropriate year button.

9. When you are finished with changes for this person, click the Submit button at the bottom of the page to save your changes and submit them for approval.

   If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
To delete a project/grant from a distribution period:

1. From the Project Browse page, select the person you want by clicking the Edit Summary button on that line. The earnings type pages are displayed.

2. If the top tab is not the page you need to change, click on the page tab for the earnings type you need to change.

3. Type zeros in the Distrib FTE field for the project/grant you want to delete.

4. Click the Calculate button to zero out the remaining fields for the project/grant. The distributions will be re-allocated to the default project/grant.

5. Click the Clean Data button to remove the zeroed out project/grant line.

6. When the distributions are correct, select another internal support type by clicking on the appropriate tab, or select another year by clicking on the appropriate year button.

7. When you are finished with changes for this individual, click the Submit button at the bottom of the page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.
Adding a Person to a Project

When you are staffing a project, you will need to add personnel to the project in Labor Accounting. You can do this through the Project Browse page by searching for the person to add along with the project/grant, and then adding the distributions on the appropriate detail pages.

Although you will not see it on the project browse detail pages, when you add distributions to your project/grant, the default project/grant is adjusted automatically, so the total commitment remains the same.

**Note:** When you add a project/grant distributions for a person you are not authorized to see, the calculated value (amount if you entered the FTE, FTE if you entered the amount) is not displayed. In addition, the project summary displays the values as dashes until the distributions are fully approved. When the distribution has been fully approved, the amounts will be displayed on both the project summary and the detail pages.

To add a person to a project:

1. On the Project Browse page:
   a) Select the project to which you are adding staff. (See “Using the Find Project/Grant Window,” on page 172 if you need more information.)
   b) Enter the person’s EmplID in the ID field. If you do not know the person’s EmplID, click the Find button next to the ID field or double-click the ID field to display the Find Person window. (See “Using the Find Person Window,” on page 162 if you need help using the Find Person window.)
   c) Click the Search button to display the person’s record in the Project Browse page.

2. Click the Edit Summary button for the person. The earnings type detail pages are displayed.

3. If the top tab is not the page you need to change, click on the page tab for the earnings type you need to change.
4. On the earnings type page, the project you entered in the search criteria on the Project Browse page is displayed, with distributions of zero in all fields.

**Note:** If you selected a project/grant that is closed for any portion of the distribution period, the project/grant is added, but the distribution period ends on the date when the project/grant is closed. Because the closed project/grant must have Distrib Amts of 0.00 (zero) in the period for which it is closed, an additional distribution period is added with zero amounts that cannot be changed for the closed project.

5. If you know the FTE percentage to be charged to your project/grant:

a) Type the percentage of the overall commitment to be charged to the project/grant (50% is entered as 0.500) in the Distrib FTE field.

If you know the dollar amount to be charged to your project/grant:

a) Click the $ checkbox to open the Distrib Amt field for input.
b) Type the amount to be charged to this project/grant in the Distrib Amt field.

6. Click the Calculate button to calculate the remaining values for all of the project/grants.

**Note:** When you add a project/grant distributions for a person you are not authorized to see, the calculated value (amount if you entered the FTE, FTE if you entered the amount) is not displayed. In addition, the project summary displays the values as dashes until the distributions are fully approved. When the distribution has been fully approved, the amounts will be displayed on both the project summary and the detail pages.

7. When the distributions are correct, you can select another internal support type by clicking on the appropriate tab, or work on another year by clicking the appropriate year button.

**Note:** If you add a summer salary from the Project Browse detail pages but you have department-level authorization, you must save the changes, and then reopen the record from the General Browse page to submit the changes.
8. When you are finished with changes for this person, click the Submit button at the bottom of the page to save your changes and submit them for approval.

If you are not ready to submit the changes for approval, click the Save button. The record will be locked to other users for 24 hours.

**Using the Find Person Window**

The Find Person window is displayed when you click on the Find button next to the ID field, or double-click on the ID field in the Project Browse search criteria panel.

**To find an ID using the Find Person window:**

1. Enter as much of the last name as you are sure of in the Last Name field.

2. Enter as much of the first name as you are sure of in the First Name field.

3. If you know the person’s department, enter the three-digit department code in the Dept field.

4. If you know the person’s staff class, select it from the drop-down list in the Staff Class field.

5. If you know the beginning of the person’s employee ID (their PeopleSoft EmplID), enter it in the PUID field.

6. The Currently Active checkbox is selected by default. If you are adding a person to a project retroactively, and the person is no longer an active employee (or graduate student), click on the Currently Active checkbox to deselect it.

   **Note:** You will only be able to add a person to the project during a period in which that person was active.

7. Click the Find button to find all the records that match your search criteria.
8. Double click on the person’s name to select the person you want from the list, or click once and then click the Finish button. You are returned to the Browse page, and the EmplID for the selected person is displayed in the ID field.
Saving, Approving, and Other Common Functions
Saving and Authorizing Changes

Saving, authorizing, submitting, and approving or disapproving changes to distributions each require a specific security access. The access definitions are listed in Table 4.

Table 4: Save and Authorization Access Types

<table>
<thead>
<tr>
<th>This access type</th>
<th>Allows you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Input</td>
<td>Make, save, and submit changes for people in your department.</td>
</tr>
<tr>
<td>Department Authorization</td>
<td>Make and authorize changes for people in your department, and submit those changes for other needed approvals.</td>
</tr>
<tr>
<td>Project Input</td>
<td>Make, save, and submit changes for people whose commitments are distributed to your project.</td>
</tr>
<tr>
<td>Project Authorization</td>
<td>Make and authorize changes for people whose commitments are distributed to your project, and submit those changes for other needed approvals.</td>
</tr>
<tr>
<td>Central Office Authorization</td>
<td>Approve or disapprove changes made by departments for graduate students or faculty. You can also make changes at this level.</td>
</tr>
</tbody>
</table>

You must have the appropriate security access to save, authorize, or approve/disapprove changes.

When you open a record to make changes, the record is locked to any other user until you either

- quit editing by clicking the Quit Edit button, or
- submit the changes for approval by clicking the Submit button.

**Important! If you save the changes by clicking the Save button, the record remains locked to other users for 24 hours, or until you return to the record (whichever happens first). If you do not return to the record within 24 hours, the record will be unlocked, and you may lose your changes if someone else edits the record.**
To save changes:

1. When changes are only partially complete for the selected individual, and you expect to return and complete the changes later, click the **Save** button at the bottom of the Summary page.

   **Note:** Clicking any of the calculation buttons saves your work in a temporary space. If you subsequently click **Quit Edit** before submitting a change for approval, both the Partial and Submit button save your changes before submitting them for approval.

   It is not necessary to click **Save** before submitting a change for approval. Both the Partial and Submit button save your changes before submitting them for approval.

2. The record will be locked to other users for 24 hours unless you return to the record sooner and do one of the following:
   - Save the changes for another 24 hours.
   - Submit your changes for approval.
   - Quit editing to remove your changes and return to the original values.

To authorize, approve, or disapprove support changes:

1. From the General Browse or Project Browse page, select the person for whom you want to review changes by clicking the **Edit Summary** button on that line. The appropriate Summary page appears (or, if you entered from the Project Browse, the detail pages appear), showing the selected person's distributions.

   **Tip!** Pending changes are displayed in red. Changes made during the current session, and saved changes that have not been submitted for approval, are displayed in blue.

2. Review the changes, opening linked pages as needed to view all the data. If you want to compare the changed distributions to the current distributions, you can display the distributions currently in effect by clicking on the **In Eff** button at the bottom of the Summary page. Click on the **Edit** button to return to the Distributions Pending page.
3. When you have reviewed the data, click one of the following buttons:

<table>
<thead>
<tr>
<th>Select...</th>
<th>To...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit</td>
<td>Save and authorize changes. If you have Department Authorization access, this command both saves and authorizes any changes you have made. For graduate students and faculty members, changes must be authorized at both the department level and the University level (Dean of the Faculty or Graduate School Authorization). Save and approve changes made at the central office level. An explanation of the change is required for the department, and must be entered in the Comment dialog box provided.</td>
</tr>
<tr>
<td>Partial</td>
<td>Save changes and approve only at your highest authorized level. For example, partial approval by a person with department level authorization will approve at the department level, but not at the project/grant level. The changes will remain pending project/grant approval.</td>
</tr>
<tr>
<td>Disappr</td>
<td>Disapprove changes.</td>
</tr>
</tbody>
</table>

**Note:** It is not necessary to save your changes before submitting them for approval, since both approval actions (Submit and Partial) save before submitting.

4. When you select the desired action, the User Comments window is displayed, where you can add a comment indicating the reason for the change or disapproval. A comment is required for disapprovals, but is not required for routine approvals.

In the case of disapprovals or changes outside your area of responsibility, it is particularly important that the comment clearly explains the action taken. The comment informs the home department or project that there was a change, or explains why their change was not approved.

If you have not made any changes, but are submitting to approve changes submitted by others, you are not required to provide a comments. The system will add a comment of either Approve or Final Approve. If you do enter a comment, it will be prefaced with Approve or Final Approve.
5. Type the comment in the New column for the appropriate year, and click on the Finish button. When you have entered the comment, the changes will be authorized, approved, or disapproved, and a confirmation dialog box will be displayed. Click the OK button to close the dialog box and return to the General Browse page.

Clicking on the Close button closes the window without adding a comment and cancels the authorization, approval, or disapproval action, not just the comment; you will be returned to the Summary page without taking the action.

Once a change is approved at all required levels, the changed lines are no longer shown in red, but return to black.
Backing Out Changes

If you decide that changes you have made are no good, there are several ways to back out the changes, depending on what you have done since you made the change.

- If you have typed values in open input fields, but have not done anything that reloads the page, such as clicking the Calc button, you can return the values to their original state by clicking the Reset button.

- If you have entered changes and calculated the result, you can click the Quit Edit button to remove the changes and return to the General Browse page. If you want to make other changes to the record, you will need to select the person again.

- If you have made changes, calculated, and saved the record, but not submitted it, you can reopen the record and then click Quit Edit to remove the changes. As long as the changes appear in blue, you can remove them by clicking the Quit Edit button.
Using Common Pop-up Windows

The Calendar window will pop up any time you double click on a date field, and the Find Project/Grant window pops up when you click the Add P/G button in any earnings type.

Using the Calendar Window

The Calendar window is displayed when you double-click on a date field. Use the controls at the top of the window to locate the month and year.

Use the following buttons to locate the desired month:

- Click to go back a year from the displayed date.
- Click to go back one month from the displayed date.
- Click to go forward one month from the displayed date.
- Click to go forward one year from the displayed date.

Then select the date by clicking on the day in the displayed month. You are returned to the input window, and the date you selected is displayed in the date field.
Using the Find Project/Grant Window

The Find Project/Grant window is displayed when you click the Add Project/Grant button, or double click on the P/G field in the Add Period window.

To find a project/grant number:

1. On the Find Project/Grant window, enter any of the following search criteria:

   **Begin**
   Enter the first several digits of the project/grant number. The resulting project/grant list will be limited to project/grants that begin with the specified digits.

   **Dept**
   Enter the department number of the department that owns the project/grant. This is also the first three characters of the project/grant number, and the resulting project/grant list will be limited to project/grants in the specified department. You can list project/grants in any department, even those you are not authorized for.

   If you are authorized for only one department, that department will be displayed as the default search criteria, but you can change the value, if necessary.

   **Sponsored Project**
   Click on this checkbox to list only sponsored projects (projects in the Fund 40 or 60 series).

   **P. I.**
   Select the primary investigator from the drop-down list. All projects with the specified P. I. will be listed. If you select ---- All ----, the list will not be filtered by P. I.

   **Fund**
   Select the desired fund code from the drop-down list. All project/grants that use this fund code will be listed. If you select ---- All ----, the list will not be filtered by fund code.

   To remove search criteria selections, click the Reset button.
2. Select the desired project/grant number by scrolling through the list and clicking on the desired project/grant. Click the Finish button to add the new project/grant number.

**Note:** If the desired project/grant is not included in the list, contact the Controller’s Office.

**Tip!** Double-clicking on the project/grant number provides the same result as clicking on the project/grant number and then clicking the Finish button.
Preparing in Advance

Labor Accounting allows you to plan your budget when you have a vacancy that needs to be filled, by creating the vacancy, encumbering the funds, and distributing the encumbrances to the desired project/grants.

**Note:** You must have at least department level access to create a vacancy. If you have only project/grant access, you must request a person with department access to add the vacancy for the project.

You can also prepare in general by creating a template that contains your most frequently used distributions. You can then use the template to save effort during data entry.

Adding a Vacancy

You can add a vacancy for any staff class, using the Add Vacancy button on the General Browse page. After you add the vacancy, you will need to edit the distributions and support or commitments by clicking the Edit Summary button on the line for the vacancy.

You can also display only vacancies by selecting **Vacancies Only** in the Special area at the bottom of the Search Criteria panel of the General Browse page.

When a person is hired to fill the vacancy, you can copy the distributions from the vacancy to the new person’s Labor Accounting record. Be sure to remove the distributions from the vacancy when you have copied them over.

To add a vacancy:

1. On the General Browse page, click the Add Vacancy button at the bottom of the page. (You may need to scroll down to see the buttons.) The Add Vacancy window is displayed.

2. In the **Last Name** field, enter the word **Vacancy**, or some other placeholder, since you probably will not know the name.

3. In the **First Name** field, enter a placeholder name or project abbreviation, if the vacancy is project related.
4. In the *Start Date* field, enter the date when the position will be filled (the date when funding must begin), in *m/d/yyyy* format, or double click in the field to display the Calendar window (see “Using the Calendar Window,” on page 171 for instruction, if necessary).

5. In the *End Date* field, enter the date when the position will end, in *m/d/yyyy* format, or double click to use the Calendar window to locate the date.

   **Note:** If the position does not have an end date, enter the date 12/31/2999.

6. If you are authorized for only one department, your department code is displayed by default in the *Dept Code* field. If you are authorized for multiple departments, enter the 3-digit number of the department for which there is a vacancy.

7. In the *Pos Code* field, enter the position number from HR (up to 10 characters). If there is no position code, leave this field blank.

8. In the *Staff Code* field, select the appropriate code from the drop-down list.

9. In the *Job Code* field, select the appropriate code from the drop-down list. For a non-faculty position, select *Other*.

10. Click the Finish button to add the vacancy. When the message *Vacancy created successfully* is displayed, click OK to return to the General Browse window.
To locate the vacancy and add budget amounts:

1. In the Search Criteria panel of the General Browse page, select **Vacancies Only** in the **Special** field. Make sure that the other search criteria fields are correct.

2. Click the **Search** button to display the list of vacancies that match any other criteria you included.

3. Locate the vacancy, and click the **Edit Summary** button at the end of that line. Depending on the staff class of the selected vacancy, the Faculty & Staff Commitment Summary or the Graduate Student Support Summary page is displayed.

4. For a graduate student vacancy, enter the anticipated support requirements, as described in “Maintaining Graduate Student Support,” on page 37.

For a faculty or staff vacancy:

a) Expand the fiscal year for which you added the vacancy, and click on the **Regular Pay** link. When the REG page is opened, you will see that the **FTE Amt** and **Duty %** fields are open for input.

b) Enter the yearly salary in the **FTE Amt** field.

c) Enter the FTE percentage in the **Duty %** field.

d) Click the **Calculate** button to distribute the encumbrance to the default project/grant.

**Note:** The amount will remain zero since the salary comes from the PeopleSoft HR system.

e) If you need to change the distribution to a different project/grant or distribute the charges across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 126.

5. If you are adding a vacancy for a faculty position that will be funded for summer salary, click on the Fac Summ tab to display the Faculty Summer Salary Distribution page. Enter the summer salary as described in “Adding Faculty Summer Salaries,” on page 132.

**Note:** If you are not in the correct year, click the button for the desired year on the bottom right. Remember that the fiscal year begins with the summer months.
6. If you are adding a vacancy for a position that will be funded with a Chair/Dean override, click on the Chair/Dean tab to display the Chair/Dean Override page. Enter the base amount of the override in the *Base Amt* field, and click the Calculate button to calculate the *Commit Amt*.

7. When you have entered all the necessary distributions, click on the Summary tab to return to the Summary page, where you can save or submit the changes.

**Creating and Using a Template**

When you have a set of standard distributions (especially for graduate students) that you use each year, you can create a template that contains all the usual distributions, and then copy from the template to the individuals with those standard distributions each year. You will need to update the template each year for graduate students.

**Note:** Templates do not create an encumbrance. Vacancies do.

When a template is copied, only commitment data, if appropriate, and distribution data is copied. No status information is copied; that data should already be there for the target individual, and will not be changed.

**To create a template:**

1. On the General Browse page, click the Add Template button at the bottom of the page. (You may need to scroll down to see the buttons.) The Add Template window is displayed.

2. In the *Last Name* field, enter the word **Template**, or some other placeholder that will allow you to quickly find the template later.

3. In the *First Name* field, enter a placeholder name that further identifies how you will use the template.

4. Leave the *Start Date* field blank.
5. In the *End Date* field, enter the date when the distributions for which you are using the template will end, in *m/d/yyyy* format, or double click to use the Calendar window to locate the date.

**Note:** If the template does not have an end date, enter the date **12/31/2999**.

6. If you are authorized for only one department, your department code is displayed in the *Dept Code* field. If you are authorized for multiple departments, enter the 3-digit number of the department for which you are creating a template.

7. Leave the *Pos Code* field blank.

8. In the *Staff Code* field, select the appropriate code from the drop-down list.

9. In the *Job Code* field, select the appropriate code from the drop-down list. For a non-faculty position, select **Other**.

10. When you click the Finish button, the template will be added. A message is displayed indicating that the template has been created successfully. Click OK to return to the General Browse page.

11. Click the Search button to refresh the personnel list and include the new template.

12. Locate the template you created, and click the Edit Summary button at the end of that line. Depending on the staff class of the selected template, the Faculty & Staff Commitment Summary or the Graduate Student Support Summary page is displayed.
13. Enter the distributions for which you are setting up the template, making sure that the distributions are entered in the correct year:

- For a graduate student template, enter the anticipated support requirements, as described in “Maintaining Graduate Student Support,” on page 37.

- For a faculty or staff template, expand the fiscal year for which you added the template, and enter the FTE Amt and Duty% values on the appropriate page. Click the Calculate button to distribute the encumbrance to the default project/grant.

  **Note:** The amount will remain zero since the salary comes from the PeopleSoft HR system.

If you need to change the distribution to a different project/grant or distribute the charges across multiple project/grants, see “Adding or Changing Project/Grant Distributions,” on page 126.

14. When you have entered all the necessary distributions, click on the Summary tab to return to the Summary page, where you can save or submit the changes.

**To use the template:**

1. From the General Browse page, open the template. Make sure the template has distributions entered in the year you need to copy.

2. Click the Copy From button to copy all percentages and distributions.

3. Click the Quit Edit button to close the template.

4. Open the record for the person you want to set up using the template.

5. Click the Copy To button, and select the year you want to copy the distributions into.

6. Make any additional adjustments, if necessary.

7. Save or submit the changes, as described in “Saving and Authorizing Changes,” on page 166.
Viewing Reports and Other Data
Viewing Comments and Status

Comments may be entered whenever a distribution is submitted, approved, or disapproved, and are required for disapprovals. Approvers at any level can review the comments if they have questions about the distribution or commitment.

Comments can be accessed in view-only mode from the Graduate Student Support Summary page and from the Faculty & Staff Commitment Summary page. If you have only project authorization, you can view the comments from any of the detail pages displayed when you edit a record. The comment window is also displayed automatically whenever you submit, approve, or disapprove changes, and at that time you can enter comments.

Status information from the PeopleSoft HR system is displayed in the first box at the top of the View Comments page.

To view comments and status information:

1. For a graduate student, access the distribution data as described in “Displaying a Student’s Support Summary,” on page 42.

   For a faculty or staff member, access the commitment data as described in “Displaying a Person’s Commitment Summary,” on page 117.

2. On the summary page (Graduate Student Support Summary or Faculty & Staff Commitment Summary), scroll down, if necessary to locate the buttons at the bottom of the page.

3. Click the View Cmt button to display the User Comments page. Comments are shown by year, and within each year, can be scrolled if needed.

   Tip! The scroll bars appear in each year only if there are more comments for that year than will fit in the display box.

4. When you have finished reviewing the comments, click the Close button to close the User Comments window and return to the summary page.
Printing Distribution Data

You can print any Labor Accounting page using your browser print function. However, since the pages tend to be quite wide, you should set the printer settings to Landscape orientation, and you may need to decrease the right and left page margins to .25 inches. The distribution data is printed just as it is displayed.

You can also print graduate student distributions in a report format by clicking the Report button on the Graduate Student Support Summary page.

To print distribution data displayed in your browser:

1. Display the page you want to print.
2. Select File from the browser menu to display the File menu.
3. Select Print from the File menu to print the distributions on your default printer.

   **Tip!** If you are not sure the data will fit correctly on the page using your current printer settings, select the Print Preview option from the File menu. If printer settings need to be adjusted, you can select Page Setup from the Print Preview toolbar, make your changes to the settings, and then select Print from the Print Preview toolbar.

To print graduate student project distributions:

1. Display the Graduate Student Support Summary page for the student.
2. Click the Report button. The Graduate Student Project Distribution Report is displayed, showing the distributions that are pending, if any. Otherwise, the report shows the distribution currently in effect.
3. Select File > Page Setup to make sure that your margins are set no larger than .5”, and that the page is in landscape orientation.
4. Select File > Print to print the distribution report.
There are two types of Labor Accounting reports, those that are available directly from Labor Accounting, and those that are available from the Data Warehouse.

**Reports in Labor Accounting**

In Labor Accounting, you can display and print reports for a single graduate student, or for all faculty or graduate students in your department.

- To display a distribution summary report for a single graduate student, click the Report button on the Graduate Student Support Summary page.

- To display and print a report for all faculty or graduate students in your department, select the desired report from the drop-down list below the search criteria on the General Browse page, and click the Report button. The following reports are available:

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Summer Salaries</td>
<td>Shows all faculty summer salaries, when they are to be paid, what project/grant has committed the funding, and the approved and pending amounts.</td>
</tr>
<tr>
<td>Faculty Summer Salaries - Payroll Exceptions</td>
<td>Shows all faculty with negative approved amounts to be paid in the current month, and includes any negative amounts plus all positive amounts. This report may show retroactive transfers of earned amounts between months (plus/minus, net zero).</td>
</tr>
<tr>
<td>Faculty Summer Salaries - Payroll Feed</td>
<td>Shows what would be paid in the current month for committed July and August earnings if Payroll were to pull the data right now.</td>
</tr>
<tr>
<td>Graduate Students - Payroll Exceptions</td>
<td>Shows graduate students with negative approved amounts to be paid in the current month, and includes both negative and positive amounts. This report may show retroactive transfers of earned amounts between months (plus/minus, net zero).</td>
</tr>
<tr>
<td>Graduate Students - Payroll Feed</td>
<td>Shows what would be paid in the current month if Payroll were to pull the data right now.</td>
</tr>
</tbody>
</table>

All of these reports are restricted by the department, staff class, and project authorization of the user.
To print graduate student project distributions:

1. Display the Graduate Student Support Summary page for the student.

2. Click the [Report] button. The Graduate Student Project Distribution Report is displayed, showing the distributions that are pending, if any. Otherwise, the report shows the distribution currently in effect.

3. Select [File > Page Setup] to make sure that your margins are set no larger than .5”, and that the page is in landscape orientation.

4. Select [File > Print] to print the distribution report.

Data Warehouse Reports

In the Data Warehouse, Labor Accounting reports include, but are not limited to the following:

<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
<th>Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LA003</td>
<td>Commitments by Staff Home Dept or Projects’ Owning Dept</td>
<td>PDF</td>
<td>This report displays the Labor Accounting commitments for staff based in the department or projects owned by the department for the specified fiscal year. Individuals are listed alphabetically within staff class. The report can be filtered by staff class or person.</td>
</tr>
<tr>
<td>LA004</td>
<td>LA Commitment to a Project Grant</td>
<td>PDF</td>
<td>This report lists all individuals with Labor Accounting commitments charged to project/grants in the specified department and fiscal year. For each project/grant, individuals are listed alphabetically within staff class. The report can also be filtered by person or project/grant range.</td>
</tr>
<tr>
<td>LA005/LA006</td>
<td>LA Commitments by Home Dept, Staff Class, or EmplID</td>
<td>PDF</td>
<td>This report lists all Labor Accounting commitments for the employees based in the specified department during the specified fiscal year. Individuals are listed alphabetically within staff class, and the report can also be filtered by staff class or person.</td>
</tr>
</tbody>
</table>
This report displays commitments in a format that can be saved as an Excel spreadsheet. It includes information from the LA003, LA004, and LA005/006 reports, without sorts, subtotals, or groupings, for easier data manipulation. It also includes additional columns that don’t fit in the PDF format reports, such as project/grant name, Award title, PI name, overhead rate, and obligated start and end dates.

**Note:** For best results, save the report before opening it to ensure that the file type is .xls rather than .html.

<table>
<thead>
<tr>
<th>Code Title</th>
<th>Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LA Commitments</td>
<td>Excel</td>
<td>This report displays commitments in a format that can be saved as an Excel spreadsheet. It includes information from the LA003, LA004, and LA005/006 reports, without sorts, subtotals, or groupings, for easier data manipulation. It also includes additional columns that don’t fit in the PDF format reports, such as project/grant name, Award title, PI name, overhead rate, and obligated start and end dates. <strong>Note:</strong> For best results, save the report before opening it to ensure that the file type is .xls rather than .html.</td>
</tr>
</tbody>
</table>

All reports in the LA00X series include fiscal year, staff class, staff description, employee name, employee ID number, earnings code, earnings code description, commitment amount, distribution period begin and end dates, and the project/grant charged. Each report also includes additional columns specific to that report.

Because more reports will be added to the Data Warehouse in the future, a complete list of the reports, along with a description of the type of data displayed in each report, is available from the Labor Accounting Documentation home page ([www.princeton.edu/LADocs](http://www.princeton.edu/LADocs)).
Appendix A: Glossary
**AI (Assistant in Instruction).** An award provided by the University that requires a specified amount of time spent in instruction.

**Appointment.** An assignment of a work-related award, such as an AI, AR, or AM.

**AR (Assistant in Research).** An award provided by the University that requires a specified percent of effort in research, usually funded by a project.

**AM (Assistant Master).** An award provided by the University that requires a specified percent of effort in assisting the residential college master.

**Bookkeeping Entries.** Entries made by the system to adjust project/grant encumbrances, for example, for sponsored project cost sharing. A lower case b on the project/grant number indicates a bookkeeping entry.

**Budget Year.** The upcoming fiscal year, for which you are creating a budget.

**CO Approval.** Central Office Approval. The Central Office involved could be the Graduate School, Human Resources, or the Office of the Dean of the Faculty.

**Commitment.** An amount paid, or pledged to be paid.

**Contract.** Admission or reenrollment contract for a graduate student that stipulates the financial support awarded to the student, and its duration. This support may come from the University or from external sponsors.

**Current View.** A subset of people in the personnel roster that you need to review or update, based on selections you make on the General Browse or Project Browse page.

**Distribution.** The assignment of a project/grant to be charged for a commitment or for a payment. All committed earnings must be distributed to a project/grant.

**Encumbrance.** A future commitment, or an outstanding commitment. An encumbrance may be positive or negative. If a payment will result, it is a positive encumbrance. If money will be returned as a result, it is a negative encumbrance.

**Fellowship, University or Departmental.** A grant to a graduate student from the University or an academic department that provides a stipend and tuition. University fellowships may be provided by endowments, general funds, centers, and programs within the University.

**Fellowship Matching Tuition.** A grant from the Graduate School that matches the tuition of an external fellowship which provides maintenance and partial tuition.

**Fund.** The high-level indicator of the source of monies or the project type. Fund 10 is for general funds. Fund 20 is for restricted funds (usually endowments or gifts). Fund 40 is for non-government sponsored projects, which are expecting something as a result. Fund 60 is for government sponsored projects.
**In Effect.** Distributions that have been fully approved and are currently active. These distributions can be seen, when changes are pending, by clicking the In Eff button.

**Offset.** A project/grant distribution created to hold funds that have been reduced until the home department can either find replacement funding or reduce the person’s pay to the new funding level. An offset occurs when a distribution to a project/grant has been approved, but is then removed or reduced, usually by a project user. Since an offset is not a real project/grant, home department and central office users cannot submit or approve changes while funds are still distributed to an offset.

**PI (Primary Investigator).** The faculty member (or other researcher) who has primary responsibility for an awarded project.

**Project/Grant.** An account to be charged for a commitment, often for a project or grant award, but also frequently a University account.

**Salary.** Support that is a remittance for work performed, such as for instruction or research, as opposed to a stipend, which is provided by a fellowship and does not require the student to work.

**Sponsored Project.** A project based on a grant for research where the sponsor is expecting some results, and where the grant usually results from a proposal. Sponsored projects are always in funds 40 and 60.

**Sponsored Tuition.** Tuition paid by sponsored projects (funds 40 and 60).

**Stipend.** Non-tuition support provided by a Fellowship, that is not a remittance for work performed (that is, the student does not have to work for it), as opposed to a salary, which is a remittance for work performed.

**TB (Teaching Budget).** The appropriations that will fund instruction; the application that is used to enter and track allocations for teaching.

**Template.** A Labor Accounting entry with standard percentages and distributions that is used as the source for copying distributions. A template does not create an encumbrance.

**Vacancy.** A Labor Accounting placeholder created to encumber funds for an expected position.
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