



Baylor University Khalix

Khalix (KLX) Complete Training Manual

Khalix Training Manual Version 1.3

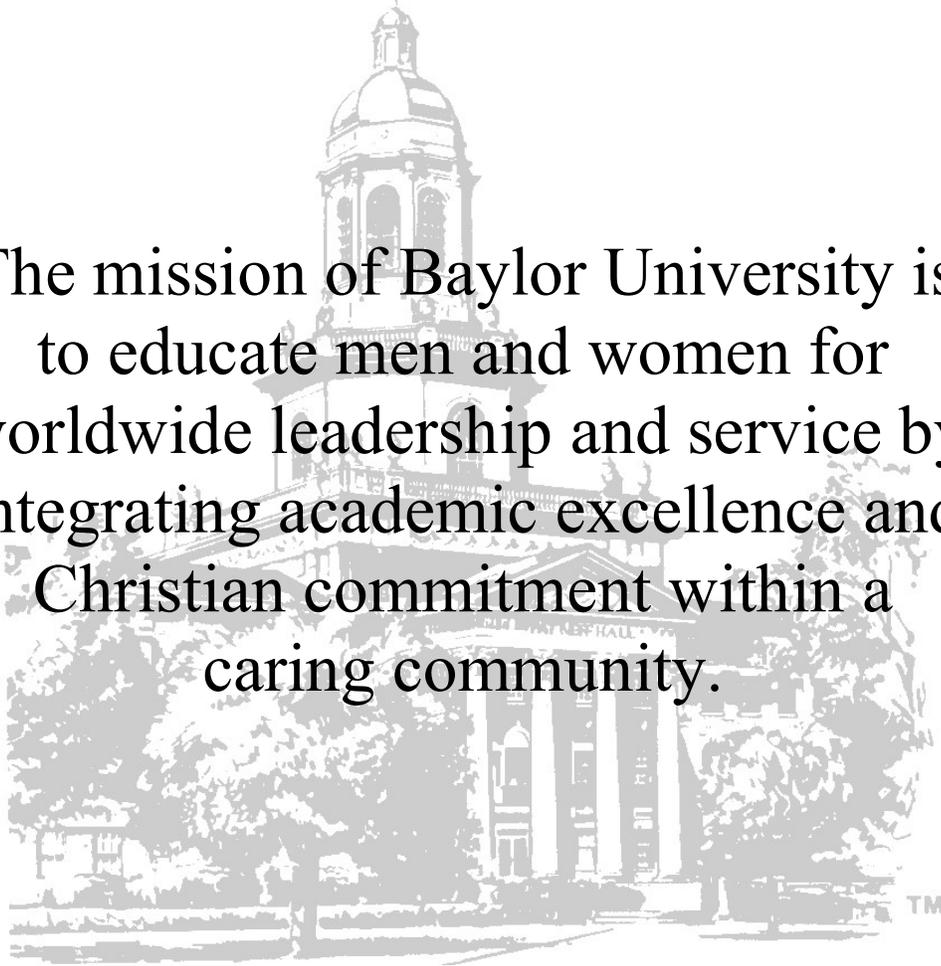
Khalix v. 7.0.3





BAYLOR

Khalix (KLX)



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to educate men and women for
worldwide leadership and service by
integrating academic excellence and
Christian commitment within a
caring community.

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KLX Complete Training Manual

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Getting Started

General Information

Purpose of KLX (Khalix)

To view current and historical financial reports, track budgetary changes on a monthly basis, and submit financial information for the upcoming fiscal year during the annual budget preparation (budget prep) process.

Password Policy

It is a violation of Baylor University policy for a user to give anyone their Windows Networking ID and password for any reason. Please contact the Help Desk (x.4357) if the BearID or password has been forgotten.

Where to go for help

Contact the following Budget Office representatives:

Christian Heger, x8617

Amber Nava, x8610

Acknowledgements

“Getting Started in Khalix through the web”, Longview Solutions Online Help Documentation

Signing on to Khalix



- Open Internet Explorer® and ensure that all pop-up blockers are disabled. Otherwise the sign-in process will be unsuccessful.

Note: Firefox® and MacIntosh browsers are not supported

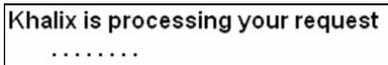


- In the Address field, type: <http://www.baylor.edu/klx>
- Press *Enter*



- Verify that *Connect Using Windows Authentication* has been selected. This tells Khalix to correctly log in using the Windows Networking ID / Bear ID.
- Verify that *Default* is select in the group field.

Note: Do not try to connect using *Khalix Authentication*. End users will not have access to Khalix Authentication and the Bear_ID and password will not work using this option.



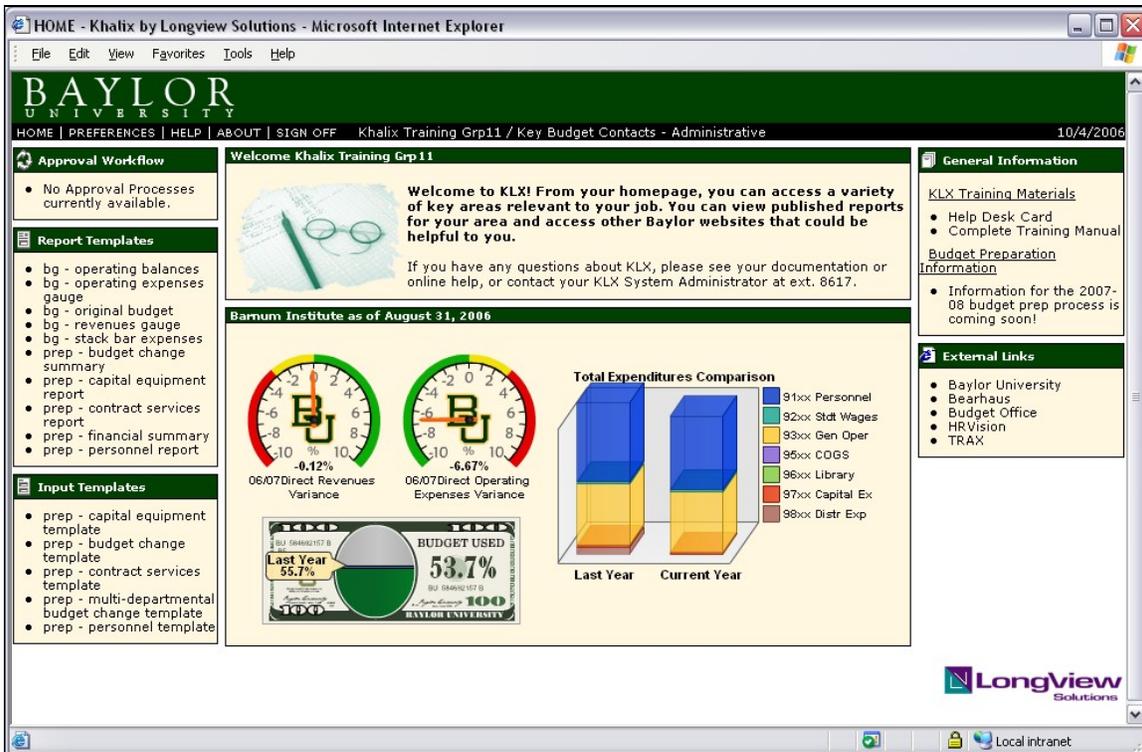
- The message, “Khalix is processing your request” is displayed.



- Upon successful login, a security window appears along with the KLX home page. Closing this security window automatically ends the KLX session, resulting in the loss of any unsaved data.
- After 60 minutes of inactivity, KLX automatically logs users off, resulting in the loss of any unsaved data.
- To warn users of the impending log off, KLX displays the warning message below (click OK to keep session active):



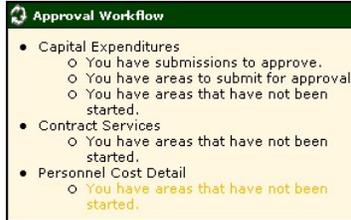
The KLX home page signals a successful log in:





The Khalix Home Page

Approval Workflow



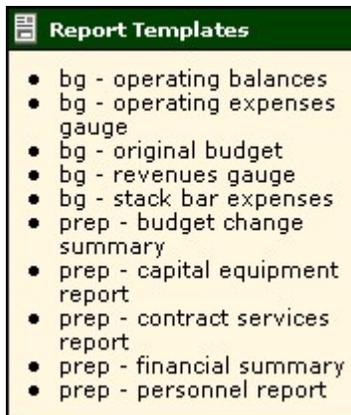
Approval Workflow

- Capital Expenditures
 - You have submissions to approve.
 - You have areas to submit for approval.
 - You have areas that have not been started.
- Contract Services
 - You have areas that have not been started.
- Personnel Cost Detail
 - You have areas that have not been started.

- Watch the *Approval Workflow* box for items which need action (e.g. data entry, approval, etc.).

Note: *Approval Workflow* will only be active during the budget prep cycle.

Report Templates



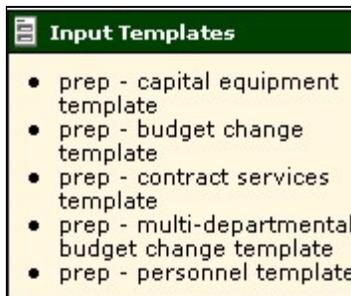
Report Templates

- bg - operating balances
- bg - operating expenses gauge
- bg - original budget
- bg - revenues gauge
- bg - stack bar expenses
- prep - budget change summary
- prep - capital equipment report
- prep - contract services report
- prep - financial summary
- prep - personnel report

- Click on a *Report Template* to run a report.

Note: Some reports will only be available during the budget prep cycle.

Input Templates



Input Templates

- prep - capital equipment template
- prep - budget change template
- prep - contract services template
- prep - multi-departmental budget change template
- prep - personnel template

- Click on an *Input Template* to enter information for the next year's budget.

Note: *Input Templates* will only be available during the budget prep cycle.

Welcome



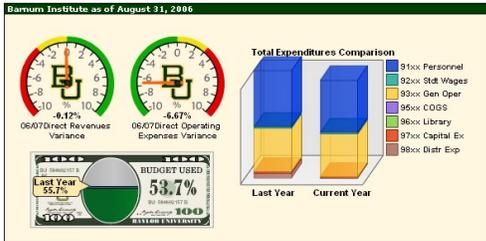
Welcome Khalix Training Cpt.11

Welcome to KLX! From your homepage, you can access a variety of key areas relevant to your job. You can view published reports for your area and access other Baylor websites that could be helpful to you.

If you have any questions about KLX, please see your documentation or online help, or contact your KLX System Administrator at ext. 8637.

- Watch the *Welcome* box for important notices about Khalix and the budget prep process.

Dashboard Gauges



- Review the *Dashboard* gauges for information about the budget as of the last month-end. Click on a gauge to see a detail report with the same information.

General Information

General Information

Budget Preparation Documentation

- No documents currently available

KLX Training Materials

- Help Desk Card
- Complete Training Manual

- Any documentation for the current budget prep cycle will be available here.
- Click one of the links to pull up the documentation for Khalix in a PDF format.

External Links

External Links

- Baylor University
- Bearhaus
- Budget Office
- Technology Procurement Policies
- TRAX

- Select a link to go to a related web site. Other than the Baylor and Budget Office home pages, a user ID and password are necessary to access these sites.
 - Baylor University – Baylor University home page
 - Bearhaus – SAS Employee information warehouse
 - Budget Office home page
 - Technology Procurement Policies
 - TRAX – TRAX (PeopleSoft) sign in

Signing Out of Khalix

When work is complete, protect the data by signing out of Khalix and closing Internet Explorer.



- Click the *Sign Off* button in the top left-hand side of the screen

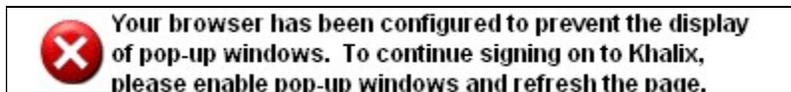


- Click the *Close* button to shut down Internet Explorer OR
- File
- Close

Also close any open reports or templates, because they do not close automatically upon exiting KLX.

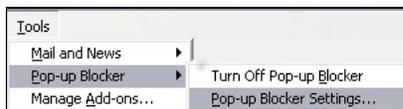
Disabling Pop-Up Blockers

If the message below is displayed, Khalix will not allow the user to sign in until the pop-up blocker is disabled or set to allow pop-ups from <http://orasoft/cgi-bin/klxprd/>.

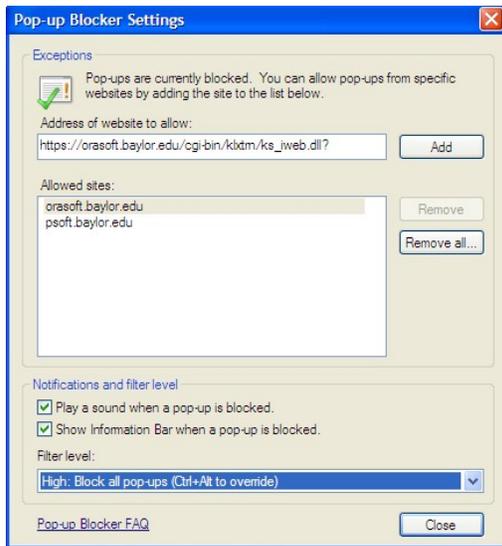


Whether or not a pop-up blocker is active will depend on the computer accessing Khalix. See the Frequently Asked Questions list on the TRAX Help website (www.baylor.edu/traxhelp) for information about the disabling Pop-up blockers

If the computer is running the most current version of XP, Internet Explorer blocks all pop-ups by default. Complete the following steps to add Khalix to the list of “allowed” pop-up sites:



- Tools
- Pop-up Blocker
- Pop-up Blocker Settings



- If this is not in the menu, it is not the most current version of XP, and Internet Explorer will not block pop-ups.



- Enter `http://orasoft/cgi-bin/klxprd/ks_iweb.dll?` in *Address of Web Site to Allow*.



- Click *Add*



- Click *Close*

Changing the Windows Password

Since Khalix uses Windows Networking authentication, users will never have to enter a Khalix password.

When necessary, reset a Bear ID password by doing the following:



- Open Internet Explorer®



- In the *Address* field, type: www.baylor.edu/passwordchange
- Press *Enter*



BearID Account Manager

Log In

User Name:

Password:

[Forgot my password](#)

- Enter the *User Name* (Bear ID)
- Enter current *Password*
- Click *OK*

To begin, please type in your last name, your date of birth, and your Baylor ID number below:
(NOTE: Last Name is case-sensitive)

Last Name

Date of Birth (MM-DD-YYYY)

Baylor ID No. (No hyphens, 800000000)

Last Name

- Enter the *Last Name*

Date of Birth

- Enter the *Date of Birth*

Baylor ID No.

- Enter the *Baylor ID No.*

- Click *Submit*

BearID Account Manager : Change Password [Logout](#)

First Security Question You have not yet set up your security questions. You must do so before proceeding.
 Select a question and enter your answer.

Second Security Question Select a question:

Answer:

Select a question:

- Select a *Security Question*

Answer:

- Enter the *Answer*

- Click *Next*

BearID Account Manager : Change Password Logout

First Security Question
You have not yet set up your security questions. You must do so before proceeding.
Select a question and enter your answer.

Second Security Question
Select a question:
Answer:

Select a question:

➤ Select a *Security Question*

Answer:

➤ Enter the *Answer*

➤ Click *Finish*

BearID Account Manager : Change Password Logout

Password Requirements
Password complexity requirements have been implemented in order to better secure the Baylor Information Systems. These requirements are now required in order to use all campus systems.

These requirements are as follows:

- Your new password must be **at least 8 characters in length**.
- Your new password must **not contain your Bear ID**.
- Three of the following conditions must be true:
 - Your new password must have **at least one uppercase alpha character (A-Z)**.
 - Your new password must have **at least one lowercase alpha character (a-z)**.
 - Your new password must have **at least one numeric character (0-9)**.
 - Your new password must have **at least one non alphanumeric character**.

If you have questions or concerns about these policies, please contact the HelpLine at helpdesk@baylor.edu or call 254-710-HELP (4357) for assistance.

Be sure to enter your new password twice to confirm the change.

Change Your Password
 Password:
 New Password:
 Confirm New Password:

Change Your Password
 Password:
 New Password:
 Confirm New Password:

➤ Enter *Password*

➤ Enter *New Password*

➤ Enter *Confirm Password*
(Must be the same as the *New Password*)

➤ Click *Change Password*



Your Bear ID password has been changed.

Your Bear ID is: Billy Bear
Your email address is: Billy_Bear@baylor.edu

For assistance contact the Help Line at [HelpDesk](#) or 710-HELP (4357).



➤ Click *Continue*



➤ Close *Internet Explorer* to make sure no one else can access this information.

Budget Preparation – Phase One

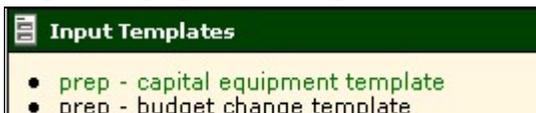
Khalix allows upcoming budget information to be entered and tracked through the system before it is fed into TRAX (PeopleSoft). Many of the functions described in this section will only be available during the budget prep cycle, which typically runs from November through March of the year prior to the new budget year.

Types of Documents Used in Phase One

Phase one involves submitting data for capital equipment, contract services, and personnel. Each of these areas has a template and a corresponding report. The template is used to input data into KLX, while the report is used to view the submitted data.

Capital Equipment Requests

Capital Equipment Template



- Click *Capital Equipment Template* under *Input Templates* to open the template.

Input view

	Item Description 1	Item Description 2	Priority	Amount of Request	Comments	
0851301 - Barnum Circus	Automobiles Item 1	2008 Honda Civic LX	Automatic transmisison	1	19,000	0
	Automobiles Item 2	2008 Ford F-150	Super Cab	2	28,000	0
	Automobiles Item 3	0	0	0	0	0
	Automobiles Item 4	0	0	0	0	0
	Automobiles Item 5	0	0	0	0	0
	- 9703 Automobiles	0	0	0	47,000	0
	+ 9705 Equipment equal to or greater than \$5,000	0	0	0	50,000	0
	+ 9706 Technology equal to or greater than \$5,000	0	0	0	25,000	0
	+ 9707 Works of Art/Collections	0	0	0	50,000	0
	+ 9754 Minor Equipment less than \$5,000	0	0	0	1,000	0
	+ 9756 Minor Technology less than \$5,000	0	0	0	3,000	0
	- Capital Details	0	0	0	175,000	0

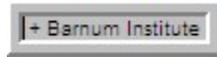
The *Capital Equipment Template* is used to submit the capital items the department is requesting for the upcoming year.

Important notes for data input

- The user can only update certain fields within Khalix.
- Fields with blue fonts are “Read Only”.
- Highlighted fields contain sensitive personnel data and are “Read Only”.
- Fields with black fonts may be updated.
- Once a change has been made and “submitted” it is a live change to the database.
- Enter the ending budget amount, not the increase or decrease to the budget amount.
- Do not use \$ symbols or commas when entering monetary amounts.

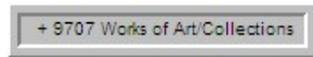
Available capital equipment data fields

Department



- Click the Rollup to see what departments make up the totals. If the user has access to only one department, the department name will be displayed.

Account



- Click titles with a plus sign to “drill down” into the detail for those account groupings.

Item Description 1

- Description of item to be acquired

Item Description 2

- Additional item details

Priority

- Which items are most important?

Amount of Request

- Amount item will cost

Available icons



- Report View – Changes the window to display only reporting mode (see example next page).



- Orientation and Symbol Selection – Allows the user to change the format of the report.



- Calculate – Allows the user’s changes to be displayed in the window totals.



- Refresh Data – Pulls a fresh copy of the data from the database.

- **Any changes entered since the last *Submit* will be lost.**



- *Submit* – Save data and update template (use frequently).

Note: This is different from the template being *submitted for approval*, which sends the template to the next user in the hierarchy. Only *submit for approval* if all data submission is complete. For more information on *submitting for approval*, see “Submitting Changes for Approval” section or click [here](#).

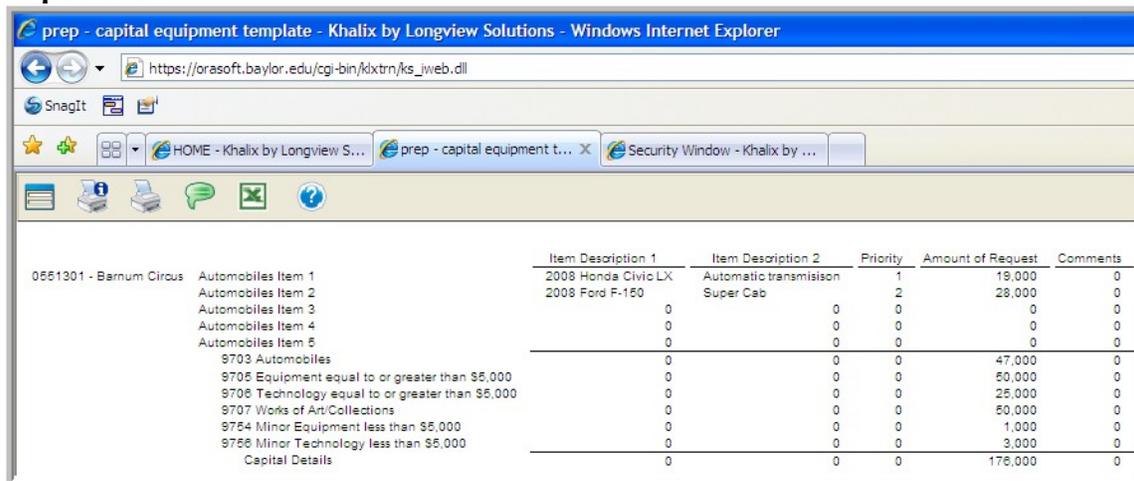


- Export to Excel – Save the currently displayed data to an Excel spreadsheet. For more information, see “Download Data to Excel” section or click [here](#).



- Help – Brings up Khalix help pages.

Report view



	Item Description 1	Item Description 2	Priority	Amount of Request	Comments
0551301 - Barnum Circus	Automobiles Item 1	2008 Honda Civic LX	1	19,000	0
	Automobiles Item 2	Automatic transmissison			
	Automobiles Item 3	2008 Ford F-150	2	28,000	0
	Automobiles Item 4		0	0	0
	Automobiles Item 5		0	0	0
	9703 Automobiles		0	47,000	0
	9705 Equipment equal to or greater than \$5,000		0	50,000	0
	9708 Technology equal to or greater than \$5,000		0	25,000	0
	9707 Works of Art/Collections		0	50,000	0
	9754 Minor Equipment less than \$5,000		0	1,000	0
	9756 Minor Technology less than \$5,000		0	3,000	0
	Capital Details		0	176,000	0

Please note that the *Capital Equipment Report* in the *Reports* section is the preferred document for printing, because it has been specially formatted for printing and is set up to suppress empty data fields.

Available capital equipment data fields

For an explanation of available data fields, see same section under input template or click [here](#).

Available icons



- Return to Input Mode – Changes the window from Report Mode to where data may be input.



- Print Preview Options – Allows the user to change the default report printing settings and print the report



- Quick Print – Prints the page without changes to the default printing preferences.



- Show Comments – This option will not be used in the current implementation of the software.



- Export to Excel – Save the currently displayed data to an Excel spreadsheet. For more information, see “Download Data to Excel” section or click [here](#).



- Help – Brings up Khalix help pages.

Capital Equipment Report

Report Templates

- bg - operating balances
- bg - operating expenses gauge
- bg - original budget
- bg - revenues gauge
- bg - stack bar expenses
- prep - budget change summary
- **prep - capital equipment report**

➤ Click *Capital Equipment Report* under *Report Templates* to open the report.

Item Description 1	Item Description 2	Priority	Amount of Request	Capital Comments
Automobiles Item 1	2008 Honda Civic LX	1	19,000	---
Automobiles Item 2	2008 Ford F-150	2	28,000	---
9763 Automobiles	Super Cab	---	47,000	---
Equip equal to or greater than \$5K Item 1	Wood chipper	3	50,000	---
9765 Equipment equal to or greater than \$5,000	120 hp	---	60,000	---
Tech equal to or greater than \$5K Item 1	IBNI blade server	4	25,000	---
9766 Technology equal to or greater than \$5,000	---	---	25,000	---
Work of Art Item 1	Bronze bear statue	5	50,000	---
9767 Works of Art Collections	---	---	60,000	---
Equip less than \$5K Item 1	A/C tools	6	1,000	---
9764 Minor Equipment less than \$5,000	---	---	1,000	---
Tech less than \$5K Item 1	2 laptop computers	7	3,000	---
9766 Minor Technology less than \$5,000	Dell	---	3,000	---
Capital Details	---	---	176,000	---
Barnum Institute	Capital Details	---	176,000	---

The *Capital Equipment Report* displays all capital equipment items which the department requested in the *Capital Equipment Template*.

Available capital equipment data fields

For an explanation of available data fields, see same section under input template or click [here](#).

Available icons



- Refresh Data – Pulls a fresh copy of the data from the database.
- Refreshing data in a report will not cause loss of unsaved data. Doing so in an input template will cause loss of unsaved data.



- Orientation and Symbol Selection – Allows the user to change the format of the report.



- Print Preview Options – Allows the user to change the default report printing settings and print the report



- Quick Print – Prints the page without changes to the default printing preferences.



- Show Comments – This option will not be used in the current implementation of the software.

Contract Services Requests

Contract Services Template



- Click *Contract Services Template* under *Input Templates* to open the template.

Input view

	Vendor	Contractual % Increase (If applicable)	Proposed Amount	Software	TCM Number	Comments
0551301 - Barnum Circus Contract 1	ABCVendor	2.00	2,350	Yes	TCM083156	Contract for tent rentals.
Contract 2	0	0.00	0	0.00	0.00	0
Contract 3	0	0.00	0	0.00	0.00	0

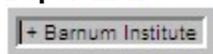
The *Contract Services Template* is used to submit the contractual items the department is requesting for the upcoming year.

Important notes for data input

- The user can only update certain fields within Khalix.
- Fields with blue fonts are “Read Only”.
- Highlighted fields contain sensitive personnel data and are “Read Only”.
- Fields with black fonts may be updated.
- Once a change has been made and “submitted” it is a live change to the database.
- Enter the ending budget amount, not the increase or decrease to the budget amount.
- Do not use \$ symbols or commas when entering monetary amounts.

Available contract services data fields

Department



- Click the Rollup to see what departments make up the totals. If the user has access to only one department, the department name will be displayed here.

Account



- Click titles with a plus sign to “drill down” into the detail for those groupings.

Contract Number

- Sequence number of the contract

Vendor

- Vendor selected for the contract

Contractual % Increase

- Percentage the contract will be increased. This is a “reasonableness” check. No calculations will be performed on this field.

Proposed Amount

- Total amount of contract for the upcoming fiscal year

Software

- Indicate whether contract is for a software license or not.

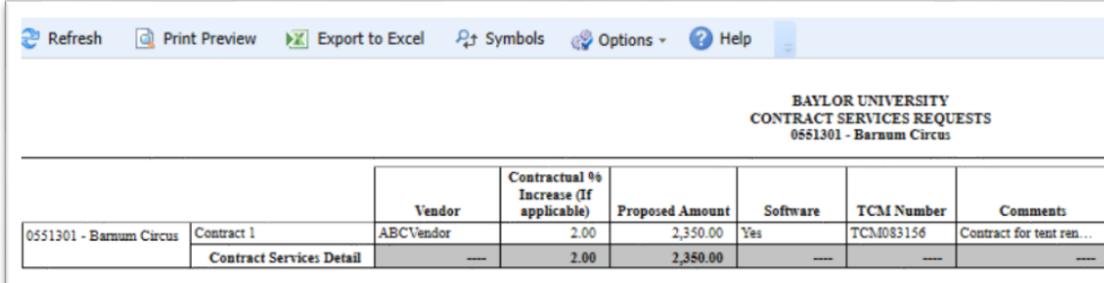
- Total Contract Management (TCM)
 - If the contract is already in TCM, enter the TCM number into this field.

- Comments
 - Comments relating to the contract may be entered here. Limit is 100 characters.
 - Do not use *Comments* displayed when you right click in a template. These comments will not be evaluated.
 - Comments entered at group rollup level will not be saved.

Available icons

For an explanation of available icons, see list of “Available Icons” at end of manual or click [here](#).

Report view



BAYLOR UNIVERSITY CONTRACT SERVICES REQUESTS 0551301 - Barnum Circus							
		Vendor	Contractual % Increase (If applicable)	Proposed Amount	Software	TCM Number	Comments
0551301 - Barnum Circus	Contract 1	ABCVendor	2.00	2,350.00	Yes	TCM083156	Contract for test ren...
	Contract Services Detail	---	2.00	2,350.00	---	---	---

Please note that the *Contract Services Report* in the *Reports* section is the preferred document for printing, because it has been specially formatted for printing and is set up to suppress empty data fields.

Available contract services data fields

For an explanation of available data fields, see same section under input template or click [here](#).

Available icons

For an explanation of available icons, see list of “Available Icons” at end of manual or click [here](#).

Contract Services Report



- Click *Contract Services Report* under *Report Templates* to open report.



BAYLOR UNIVERSITY CONTRACT SERVICES REQUESTS Barnum Institute						
		Vendor	Contractual % Increase (If applicable)	Proposed Amount	Comments	
0551301 - Barnum Circus	Contract 1	Software Plus	5.00	15,000.00	Ticket software	
	Contract 2	Feed and More	10.00	60,000.00	Animal feed	
	Contract Services Detail		----	15.00	75,000.00	----
0551304 - Tent Maintenance	Contract 1	Tents 'R' US	5.00	150,000.00	Annual tent maintenance	
	Contract Services Detail		----	5.00	150,000.00	----
Barnum Institute		Contract Services Detail	----	20.00	225,000.00	----

The *Contract Services Report* displays all contract services items which the department requested in the *Contract Services Template*.

Available contract services data fields

For an explanation of available data fields, see same section under input template or click [here](#).

Available icons

For an explanation of available icons, see list of “Available Icons” at end of manual or click [here](#).

Personnel Verification Process

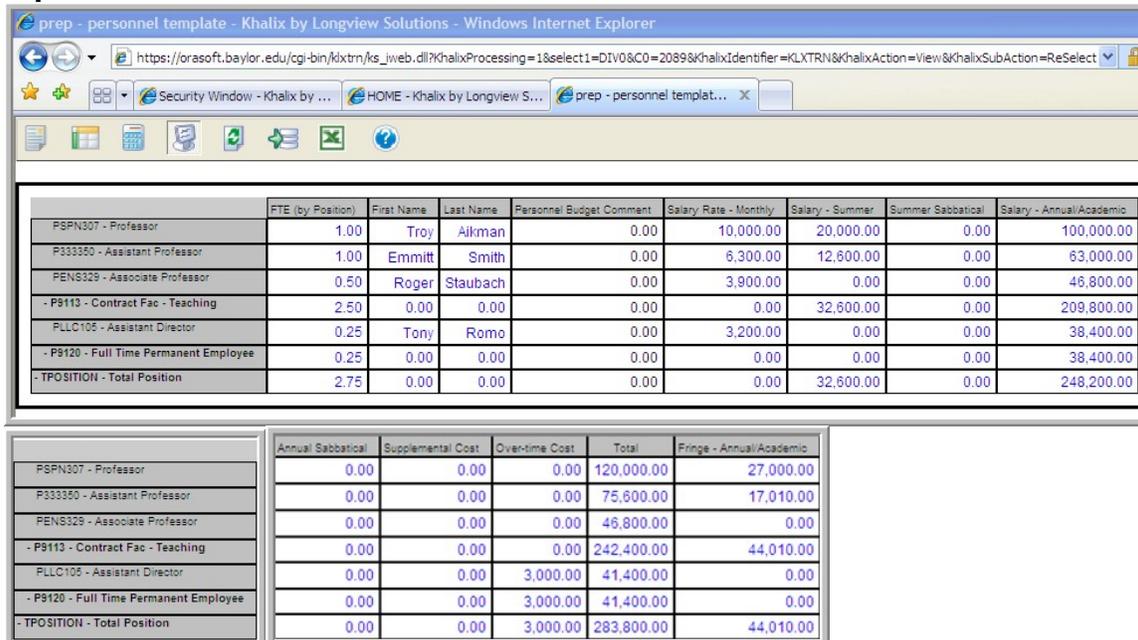
Personnel Template

Input Templates

- prep - capital equipment template
- prep - budget change template
- prep - contract services template
- prep - multi-departmental budget change template
- **prep - personnel template**

- Click *Personnel Template* under *Input Templates* to open the template. This corresponds to the old “Page 2” information. The user’s access will determine whether or not they can view or update this area. This information will rarely change at this point in the process. This is just a “sanity check” to make sure everything is correct for the new budget year.

Input view



	FTE (by Position)	First Name	Last Name	Personnel Budget Comment	Salary Rate - Monthly	Salary - Summer	Summer Sabbatical	Salary - Annual/Academic
PSPN307 - Professor	1.00	Troy	Aikman	0.00	10,000.00	20,000.00	0.00	100,000.00
P333350 - Assistant Professor	1.00	Emmitt	Smith	0.00	6,300.00	12,600.00	0.00	63,000.00
PENS329 - Associate Professor	0.50	Roger	Staubach	0.00	3,900.00	0.00	0.00	46,800.00
- P9113 - Contract Fac - Teaching	2.50	0.00	0.00	0.00	0.00	32,600.00	0.00	209,800.00
PLLC105 - Assistant Director	0.25	Tony	Romo	0.00	3,200.00	0.00	0.00	38,400.00
- P9120 - Full Time Permanent Employee	0.25	0.00	0.00	0.00	0.00	0.00	0.00	38,400.00
- TPOSITION - Total Position	2.75	0.00	0.00	0.00	0.00	32,600.00	0.00	248,200.00

	Annual Sabbatical	Supplemental Cost	Over-time Cost	Total	Fringe - Annual/Academic
PSPN307 - Professor	0.00	0.00	0.00	120,000.00	27,000.00
P333350 - Assistant Professor	0.00	0.00	0.00	75,600.00	17,010.00
PENS329 - Associate Professor	0.00	0.00	0.00	46,800.00	0.00
- P9113 - Contract Fac - Teaching	0.00	0.00	0.00	242,400.00	44,010.00
PLLC105 - Assistant Director	0.00	0.00	3,000.00	41,400.00	0.00
- P9120 - Full Time Permanent Employee	0.00	0.00	3,000.00	41,400.00	0.00
- TPOSITION - Total Position	0.00	0.00	3,000.00	283,800.00	44,010.00

The *Personnel Template* lists the positions the department has budgeted for the upcoming year. The user may only enter comments, which will be manually processed by the Budget Office and, if approved, manually entered into the Banner Payroll System. Any new position requests need to be submitted via Project Office.

Important notes for data input

- The user can only update certain fields within Khalix.
- Fields with blue fonts are “Read Only”.
- Highlighted fields contain sensitive personnel data and are “Read Only”.
- Fields with black fonts may be updated.
- Once a change has been made and “submitted” it is a live change to the database.

Available personnel data fields

- Position**

+ P9113 - Contract Fac

 - Click a subtotal to hide or display the detail represented by that position number

- FTE (by position)

 - Full time equivalent value for the position

- First Name

 - First name of incumbent at the time that Banner data is pulled

- Last Name

 - Last name of incumbent at the time that Banner data is pulled

- Personnel Budget Comment

 - Enter comments here to request changes that need to be made. (This is the only field where the user may enter information. Limit is 100 characters.)

- Salary Rate – Monthly

 - Salary rate per month – academic year for faculty; annual for staff

- Salary – Summer

 - Salary during the summer

- Summer Sabbatical

 - Cost for summer sabbatical

- Salary Annual / Academic

 - Annual salary

- Annual Sabbatical

 - Cost for fall or spring term sabbatical

- Supplemental Cost

 - Additional non-teaching pay by position or department

- Over-Time Cost

 - Budget by department

- Total

 - Total Cost for the Position

- Fringe – Annual / Academic

 - Cost of fringe benefits

Available icons



- Disable Conditional Displays – Displays accounts with zero balances. This is how users enter values for accounts which have not previously been in their budget. Toggles data on / off.

For an explanation of available icons, see list of “Available Icons” at end of manual or click [here](#).

Report view

Baylor University Budget for Twelve Months Ending May 31, 2018 Personnel Cost Detail - Employees Other Than Students Banum Institute													
		FTE (by Position)	Last Name	First Name	Personnel Budget Comment	Salary Rate - Monthly	Salary - Summer	Summer Sabbatical	Salary - Annual/Academic	Annual Sabbatical	Supplemental Cost	Over-time	
0551301 - Banum Circus	P15201 - Analyst/Programmer	1.00	Walters	Barbara		4,000.00	-	-	48,000.00	-	-	-	-
	P148043 - SrAcadConsultant/ClaimTechSvcs	1.00	Smith	John		4,000.00	10,000.00	-	40,000.00	-	-	-	-
	P337401 - Environmental Lab Custs	1.00	Doe	Jane		2,500.00	-	-	30,000.00	-	-	-	-
	P9120 - Full Time Permanent Employee	3.00	-	-	-	-	10,000.00	-	118,000.00	-	-	-	-
	TPOSITION - Total Position	3.00	-	-	-	-	10,000.00	-	118,000.00	-	-	-	-
0551302 - Banum Clown School	P114127 - Online Specialist	1.00	Richards	Tom		3,000.00	-	-	36,000.00	-	-	-	-
	P162929 - Associate Research Professor	1.00	Barnes	Matt		2,200.00	-	-	26,400.00	-	-	-	-
	P9120 - Full Time Permanent Employee	2.00	-	-	-	-	-	-	62,400.00	-	-	-	-
	TPOSITION - Total Position	2.00	-	-	-	-	-	-	62,400.00	-	-	-	-
0551303 - Managerie	TPOSITION - Total Position	3.00	-	-	-	-	10,000.00	-	118,000.00	-	-	-	-
0551304 - Tent Maintenance	TPOSITION - Total Position	3.00	-	-	-	-	10,000.00	-	118,000.00	-	-	-	-
0551305 - Acrobatics	TPOSITION - Total Position	3.00	-	-	-	-	10,000.00	-	118,000.00	-	-	-	-
0551306 - Elephant Training	TPOSITION - Total Position	3.00	-	-	-	-	10,000.00	-	118,000.00	-	-	-	-
Banum Institute	TPOSITION - Total Position	17.00	-	-	-	-	50,000.00	-	652,400.00	-	-	-	-

The *Report View* lists the positions the department has budgeted for the upcoming year.

Available personnel data fields

For an explanation of available data fields, see same section under input template or click [here](#).

Available icons

For an explanation of available icons, see list of "Available Icons" at end of manual or click [here](#).

Personnel Report

Report Templates

- bg - operating balances
- bg - operating expenses gauge
- bg - original budget
- bg - revenues gauge
- bg - stack bar expenses
- prep - budget change summary
- prep - capital equipment report
- prep - contract services report
- prep - financial summary
- prep - personnel report

➤ Click *Personnel Report* under *Report Templates*.

Note: This only prints on Legal Paper. The data is better viewed from the input template

	FTE (by Position)	Last Name	First Name	Personnel Budget Comment	Salary Rate - Monthly	Salary - Summer	Summer Sabbatical	Salary - Annual/Academic	Annual Sabbatical
PSPN307 - Professor	1.00	Aikman	Troy	----	10,000.00	20,000.00	----	100,000.00	----
P333350 - Assistant Professor	1.00	Smith	Emmitt	----	6,300.00	12,600.00	----	63,000.00	----
PENS329 - Associate Professor	0.50	Staubach	Roger	----	3,900.00	----	----	48,800.00	----
P8113 - Contract Fac - Teaching	2.50	----	----	----	----	32,600.00	----	209,800.00	----
PLLC105 - Assistant Director	0.25	Romo	Tony	----	3,200.00	----	----	38,400.00	----
P9120 - Full Time Permanent Employee	0.25	----	----	----	----	----	----	38,400.00	----
TPOSITION - Total Position	2.75	----	----	----	----	32,600.00	----	248,200.00	----

	Supplemental Cost	Over-time Cost	Total	Fringe - Annual/Academic
PSPN307 - Professor	----	----	120,000.00	27,000.00
P333350 - Assistant Professor	----	----	75,600.00	17,010.00
PENS329 - Associate Professor	----	----	48,800.00	----
P8113 - Contract Fac - Teaching	----	----	242,400.00	44,010.00
PLLC105 - Assistant Director	----	3,000.00	41,400.00	----
P9120 - Full Time Permanent Employee	----	3,000.00	41,400.00	----
TPOSITION - Total Position	----	3,000.00	283,800.00	44,010.00

The *Personnel Report* lists the positions the department has budgeted for the upcoming year.

Available personnel data fields

For an explanation of available data fields, see same section under input template or click [here](#).

Available icons

For an explanation of available icons, see list of “Available Icons” at end of manual or click [here](#).

Budget Preparation – Phase Two

Khalix (KLX) allows upcoming budget information to be entered and tracked through the system before it is fed into TRAX (PeopleSoft). Many of the functions described in this section will only be available during the budget prep cycle, which typically runs from November through March of the year prior to the new budget year.

Phase two involves checking the pre-calculated budgets for accuracy. Funds may be moved between different accounts and / or departments, but the move has to result in a net zero impact.

Types of Documents Used in Phase Two

The following three documents are used for this purpose: Budget Change Template, Budget Change Summary Report, and Financial Summary Report. The template (Budget Change Template) is used to input data into KLX, while the reports are used to view submitted data (Budget Change Summary Report) and historical data (Financial Summary Report).

Budget Change Process

Budget Change Template

Input Templates

- prep - budget change template
- prep - multi-departmental budget change template

Click *Budget Change Template* under *Input Templates* to open the template. This information will typically be made available in February. The *Multi-Departmental Budget Change Template* is only available to Key Budget Contacts.

Input view

	FY 07-08	FY 08-09	Original Budget 2009-10	Adj Bud Dec-09	Pre-Calculated Budget 10-11	Proposed Budget 10-11	Variance	Budget Comment 10-11
0061302 - Balmum Clovis School								
+ Gross Revenues	1,555,477	1,164,425	1,389,700	1,298,880	1,344,133	1,344,133	0	0
9120 - Full Time Permanent Employee	0	0	131,000	133,456	138,127	138,127	0	0
912010 - Ft Perm - Admin & Prof	128,855	123,939	0	0	0	0	0	0
916030 - FIE Supp Comp-Teaching	64,000	0	0	0	0	0	0	0
915090 - FIE Supp Comp-Other	47,909	0	0	0	0	0	0	0
9163 - Part-Time Lecturers	0	89,500	93,000	97,500	100,913	100,913	0	0
9190 - Budget Fringe Benefits	0	0	43,725	44,487	46,044	46,044	0	0
9191 - Unemployment Comp Reimb	7,544	984	0	0	0	0	0	0
9195 - Group Insurance Plans Distr	15,248	12,819	0	0	0	0	0	0
9197 - Retirement	12,125	9,812	0	0	0	0	0	0
9199 - Social Security	15,018	14,034	0	0	0	0	0	0
+ 91xx Personnel	290,698	250,688	267,725	275,443	285,084	285,084	0	0
9203 - Advertising	342,817	308,970	323,880	290,715	269,840	269,840	0	0
9318 - Contract Services	15,787	16,010	35,000	35,000	36,225	36,225	0	0

The *Budget Change Template* describes the budget the department is requesting for the next year.

Important notes for data input

- The user can only update certain fields within Khalix.
- Fields with blue fonts are “Read Only”.
- Highlighted fields contain sensitive personnel data and are “Read Only”.
- Fields with black fonts may be updated.
- Once a change has been made and “submitted” it is a live change to the database.
- Enter the ending budget amount, not the increase or decrease to the budget amount.
- Do not use \$ symbols or commas when entering monetary amounts.

Available budget change data fields

Department

+ Barnum Institute

- Click the Rollup to see what departments make up the totals. If the user has access to only one department, the department name will be displayed.

Account

+ 93xx General Operating

9703 - Automobiles

9754 - Minor Equipment

9756 - Technology less than \$5,000

- 97xx Capital Expenditures

- Click titles with a plus sign to “drill down” into the detail for those account groupings (e.g. 93xx).
- Individual accounts will total at the bottom into the general category (e.g. 9754).
- Personnel accounts cannot be changed (except 9199).

Time periods

FY 07/08

- The only time period that will accept changes is Proposed Budget 09/10. All other time periods are read-only and serve as reference points (shown by blue font).

FY 08/09

- Total for fiscal year before last (FY 2008)

Original Budget 2009/10

- Total for previous fiscal year (FY 2009)

Adjusted Budget December 09

- Original budget for current fiscal year (FY 2010)

Pre-Calculated Budget 10/11

- Revised budget for current fiscal year (FY 2010)
- Budget Office pre-calculated budget for upcoming fiscal year (FY 2011)

Proposed Budget 10/11

- Requested budget for upcoming fiscal year (FY 2011). **NOTE:** Enter the new amount, not increase or decrease

Variance

- The difference between the Budget Office pre-calculated budget and the user’s proposed budget. Total budget changes must total to zero.

Budget Comment 10/11

- Comments explaining changes to proposed budget. Limited to 100 characters.

Line Item Detail

Line Item Detail- prep - budget change template

Comment	Proposed Budget 07/08
<input type="checkbox"/> Circus is coming to town mail out	500
<input type="checkbox"/> Big fun under the big top	250
Total:	750

Clear Add New Row

Calculate Print Done Cancel

ACCOUNTS : 9359 - Postage
 ENTITIES : 0551301 - Barnum Circus
 AQUARIUS : Aquarius General symbol
 CONTROLS : Current Working Version

- **Note:** Advanced feature that is used by few users.
- Right click on a field and select *Line Item Detail* to add details to explain where a number came from (if necessary). The green bar on the left-hand side of the cell indicates that line item details are available.
- Click *Calculate*
- Click *Done*



Available icons



- Report View – Changes the window to display only reporting mode (see example next page).



- Orientation and Symbol Selection – Allows the user to change the format of the report.



- Calculate – Allows the user's changes to be displayed in the window totals.



- Disable Conditional Displays – Displays accounts with zero balances. This is how users enter values for accounts which have not previously been in their budget. Toggles data on / off.



- Refresh Data – Pulls a fresh copy of the data from the database.

- **Any changes entered since the last *Submit* will be lost.**



- *Submit* – Save data and update template (use frequently).

Note: This is different from the template being *submitted for approval*, which sends the template to the next user in the hierarchy. Only *submit for approval* if all data submission is complete. For more information on *submitting for approval*, see “Submitting Changes for Approval” section or click [here](#).



- Export to Excel – Save the currently displayed data to an Excel spreadsheet. For more information, see “Download Data to Excel” section or click [here](#).



- Help – Brings up Khalix help pages.

Report View

Budget Change Template 0551302 - Barnum Clown School									
	FY 07-08	FY 08-09	Original Budget 2007-10	Adj Bud Dec 09	Pre-Calculated Budget 10-11	Proposed Budget 10-11	Variance	Budget Comment 10-11	
0551302 - Barnum Clown School									
Gross Revenues	1,555,477	1,164,425	1,389,700	1,298,690	1,344,133	1,344,133	----	----	
9120 - Full Time Permanent Employee	----	----	131,000	133,456	138,127	138,127	----	----	
912010 - Ft Perm - Admin & Prof	128,855	123,939	----	----	----	----	----	----	
912030 - Ft E Supp Comp-Teaching	54,000	----	----	----	----	----	----	----	
912090 - Ft E Supp Comp-Other	47,909	----	----	----	----	----	----	----	
9123 - PartTime Lectures	----	55,500	93,000	97,500	100,913	100,913	----	----	
9190 - Budget Fringe Benefits	----	----	43,725	44,497	46,044	46,044	----	----	
9191 - Unemployment Comp Reimp	7,544	994	----	----	----	----	----	----	
9195 - Group Insurance Plans Distr	16,249	12,619	----	----	----	----	----	----	
9197 - Retirement	12,126	9,612	----	----	----	----	----	----	
9198 - Social Security	18,016	14,034	----	----	----	----	----	----	
9199 - Personnel	290,698	250,698	267,725	275,443	285,084	285,084	----	----	
9300 - General Operating	735,332	709,052	763,901	676,216	701,954	701,954	----	----	
9700 - Capital Expenditures	1,791	----	----	----	----	----	----	----	
9800 - Distributed Expense	216,837	161,861	194,604	184,225	180,673	180,673	----	----	
Net Surplus (Deficit)	312,119	43,823	163,670	160,796	166,422	166,422	----	----	

Please note that the *Budget Change Summary Report* in the *Reports* section is the preferred document for printing, because it has been specially formatted for printing and is set up to suppress empty data fields.

Available budget change data fields

For an explanation of available data fields, see same section under input template or click [here](#).

Available icons



➤ Return to Input Mode – Changes the window from Report Mode to where data may be input.



➤ Print Preview Options – Allows the user to change the default report printing settings and print the report



➤ Quick Print – Prints the page without changes to the default printing preferences.



➤ Show Comments – This option will not be used in the current implementation of the software.



➤ Export to Excel – Save the currently displayed data to an Excel spreadsheet. For more information, see “Download Data to Excel” section or click [here](#).



➤ Help – Brings up Khalix help pages.



Budget Change Summary Report

Report Templates

- bg - operating balances
- bg - operating expenses gauge
- bg - original budget
- bg - revenues gauge
- bg - stack bar expenses
- **prep - budget change summary**
- prep - capital equipment report
- prep - contract services report
- prep - financial summary
- prep - personnel report

➤ Click *Budget Change Summary* under *Report Templates*.

BAYLOR UNIVERSITY
BUDGET CHANGE SUMMARY REPORT 2010/11
0551302 - Barnum Clown School

	Original Budget 2009/10	Adj Bud Dec 09	Pre-Calculated Budget 10/11	Proposed Budget 10/11	Variance	Budget Comment 10/11
0551302 - Barnum Clown School						
Net Revenues	1,389,700.00	1,298,880.00	1,344,133.00	1,344,133.00	----	----
91xx Personnel	267,725.00	275,443.00	285,084.00	285,084.00	----	----
9303 - Advertising	323,880.00	260,715.00	269,840.00	269,840.00	----	----
9318 - Contract Services	35,000.00	35,000.00	36,225.00	36,225.00	----	----
9322 - Equipment Not Owned By Baylor	44,000.00	32,753.00	33,899.00	33,899.00	----	----
9323 - Food Expense	88,835.00	88,835.00	91,944.00	91,944.00	----	----
9340 - Honorarium & Professional Fees	5,000.00	5,000.00	5,175.00	5,175.00	----	----
9342 - Guests & Entertainment	7,004.00	7,004.00	7,249.00	7,249.00	----	----
9343 - Housing Expense	52,522.00	52,522.00	54,360.00	54,360.00	----	----
9358 - Memberships	1,500.00	1,500.00	1,553.00	1,553.00	----	----
9359 - Postage	3,000.00	3,000.00	3,105.00	3,105.00	----	----
9360 - Repairs and Maintenance	1,000.00	1,000.00	1,035.00	1,035.00	----	----
9367 - Recruiting Students	5,000.00	5,000.00	5,175.00	5,175.00	----	----
9370 - Supplies	55,333.47	55,333.47	57,270.00	57,270.00	----	----
9371 - Duplicating/Copier Services	1,226.75	1,226.75	1,270.00	1,270.00	----	----
9372 - Printing	2,000.00	2,000.00	2,070.00	2,070.00	----	----
9376 - Telephone Expense	5,000.00	5,000.00	5,175.00	5,175.00	----	----
9382 - Travel - Individual	20,000.00	20,000.00	20,700.00	20,700.00	----	----
9389 - Travel - Group	98,500.00	98,500.00	101,948.00	101,948.00	----	----
9399 - Miscellaneous Oper Exp	15,000.00	3,527.00	3,951.00	3,951.00	----	----
93xx General Operating	763,801.22	678,216.22	701,954.00	701,954.00	----	----
96xx Distributed Expense	194,604.00	194,604.00	190,873.00	190,873.00	----	----
Expenses	1,226,030.22	1,137,884.22	1,177,711.00	1,177,711.00	----	----
Statement of Revenues & Expenses	163,669.78	160,795.78	166,422.00	166,422.00	----	----

The *Budget Change Summary* Report compares the original budget and revised budgets for the current fiscal year. It also shows the pre-calculated and proposed budgets for the upcoming fiscal year and calculates a variance. It is formatted for printing.

Available budget change data fields

Department

+ Barnum Institute

➤ Click the Rollup to see what departments make up the totals. If the user has access to only one department, the department name will be displayed.

Account

+ 93xx General Operating

9703 - Automobiles

9754 - Minor Equipment

9756 - Technology less than \$5,000

- 97xx Capital Expenditures

➤ Click titles with a plus sign to “drill down” into the detail for those account groupings (e.g. 93xx).

➤ Individual accounts will total at the bottom into the general category (e.g. 9754).

➤ Personnel accounts cannot be changed (except 9199).

Time periods

Original Budget 2009/10

➤ Original budget for current fiscal year (FY 2010).

- Adjusted Budget December 09 ➤ Revised budget for current fiscal year (FY 2010).
- Pre-Calculated Budget 10/11 ➤ Budget Office pre-calculated budget for upcoming fiscal year (FY 2011).
- Proposed Budget 10/11 ➤ Requested budget for upcoming fiscal year (FY 2011).
- Variance ➤ The difference between the Budget Office pre-calculated budget and the user's proposed budget. Total budget changes must total to zero.
- Budget Comment 10/11 ➤ Comments explaining changes to proposed budget. Limited to 100 characters.

Available icons

For an explanation of available icons, see list of "Available Icons" at end of manual or click [here](#).



Financial Summary Report

Report Templates

- bg - operating balances
- bg - operating expenses gauge
- bg - original budget
- bg - revenues gauge
- bg - stack bar expenses
- prep - budget change summary
- prep - capital equipment report
- prep - contract services report
- **prep - financial summary**
- prep - personnel report

➤ Click *Financial Summary* under *Report Templates*.

**BAYLOR UNIVERSITY
FINANCIAL SUMMARY REPORT 2010/11
0551302 - Barnum Clown School**

	FY 06/07	FY 07/08	FY 08/09	Original Budget 2009/10	Adj Bud Dec 09
0551302 - Barnum Clown School					
Net Revenues	1,118,040.00	1,666,477.00	1,164,424.68	1,389,700.00	1,298,680.00
91xx Personnel	294,654.33	290,697.95	260,688.20	267,725.00	276,443.00
9303 - Advertising	226,607.00	342,817.48	308,969.61	323,880.00	260,715.00
9318 - Contract Services	30,317.00	15,786.50	16,010.00	35,000.00	35,000.00
931840 - Contract Services-Team Building	4,785.00	4,041.05	3,960.00	----	----
9332 - Equipment Not Owned By Baylor	----	35,209.40	38,491.19	44,000.00	32,753.00
9333 - Food Expense	73,548.44	91,672.37	83,564.79	88,835.00	88,835.00
9340 - Honorarium & Professional Fees	175.00	73.08	6,992.74	5,000.00	5,000.00
934040 - Other Professional Fees	----	636.00	887.50	----	----
934090 - Reimburse Expense -- Honorium	215.00	245.20	39.00	----	----
9342 - Guests & Entertainment	9,424.93	5,744.89	9,052.10	7,004.00	7,004.00
9343 - Housing Expense	65,388.73	44,244.92	50,682.16	62,522.00	62,522.00
9367 - Personnel Recruitment	----	2,497.20	----	----	----
9368 - Memberships	1,930.00	2,250.00	1,045.50	1,500.00	1,500.00
9369 - Postage	1,448.09	1,383.56	1,412.61	3,000.00	3,000.00
9360 - Repairs and Maintenance	----	----	993.00	1,000.00	1,000.00
9367 - Recruiting Students	----	166.15	2,382.21	5,000.00	5,000.00
9370 - Supplies	14,404.70	11,412.63	9,921.76	55,933.47	55,933.47
937010 - Supplies - Books & Periodicals	39,132.16	28,170.62	39,208.62	----	----
937020 - Supplies - Bookstore	630.00	1,134.00	704.00	----	----
937030 - Supplies - Copying	65.37	290.19	1,277.28	----	----
937035 - Supplies - Departmental Copies	----	621.02	----	----	----
937045 - Supplies - Postage Serv Fees	149.90	804.59	----	----	----
937050 - Supplies - Laboratory	----	----	1,446.50	----	----
937060 - Supplies - Printing	----	439.56	195.33	----	----
937095 - Supplies-Purchasing Card	7,677.71	4,609.41	7,377.88	----	----
9371 - Duplicating/Copier Services	----	----	----	1,226.75	1,226.75
9372 - Printing	1,497.65	1,793.32	3,605.81	2,000.00	2,000.00
9375 - Telephone Expense	6,119.92	6,283.76	3,952.49	5,000.00	5,000.00
9382 - Travel - Individual	32,965.22	23,311.91	17,624.00	20,000.00	20,000.00
938295 - Travel Card	142.96	----	----	----	----
9389 - Travel - Group	63,685.50	109,894.33	103,147.32	98,500.00	98,500.00
9399 - Miscellaneous Oper Exp	----	----	1,809.00	15,000.00	3,827.00
93xx General Operating	580,300.27	735,332.14	708,052.40	763,801.22	678,216.22
97xx Capital Expenditures	9,761.03	1,790.50	----	----	----
98xx Distributed Expense	170,445.00	215,536.98	161,861.00	194,504.00	184,225.00
Expenses	1,055,060.63	1,243,357.57	1,120,601.60	1,226,030.22	1,137,884.22
Statement of Revenues & Expenses	62,979.37	312,119.43	43,822.98	163,669.78	160,795.78

The *Financial Summary* Report compares the actual amounts for the past three fiscal years to the revised current budget for the current fiscal year.

Available financial summary data fields

Department

+ Barnum Institute

➤ Click the Rollup to see what departments make up the totals. If the user has access to only one department, the department name will be displayed.



Account

+ 93xx General Operating
9703 - Automobiles
9754 - Minor Equipment
9756 - Technology less than \$5,000
- 97xx Capital Expenditures

- Click titles with a plus sign to “drill down” into the detail for those account groupings (e.g. 93xx).
- Individual accounts will total at the bottom into the general category (e.g. 9754).
- Personnel accounts cannot be changed (except 9199).

Time periods

FY 06/07

- Total for fiscal year two years prior (FY 2007)

FY 07/08

- Total for fiscal year before last (FY 2008)

FY 08/09

- Total for previous fiscal year (FY 2009)

Original Budget 2009/10

- Original budget for current fiscal year (FY 2010)

Adjusted Budget December 09

- Revised budget for current fiscal year (FY 2010)

Available icons

For an explanation of available icons, see list of “Available Icons” at end of manual or click [here](#).

Additional KLX tools

Downloading Data to Excel

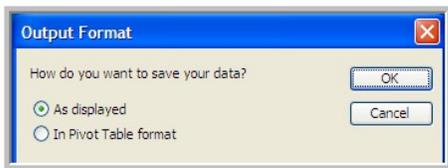
In this latest version of KLX, users have the option to download data from templates (in input or report view) and reports into Excel. These documents can be saved and modified like any other Excel document. As a result, users can format these documents for printing at their own convenience.

Note: The data in KLX will remain the official record of your submissions.

To download KLX data to Excel, follow these steps:



- Click the Export to Excel icon



- Choose the Output Format
 - a. As displayed – Data will load exactly as it did in KLX
 - b. In Pivot Table format – Data will be available in pivot table

Either choice

- Decide where to save the file, e.g. desktop, my documents, or a network drive
- Name the file appropriately

Printing Reports



- Click *Capital Equipment Report* under *Report Templates*

Note: The *Capital Equipment Report* is only an example. All printing on KLX follows these steps.

CAPITAL EQUIPMENT REQUESTS				
	Item Description 1	Item Description 2	Priority	Amount of Request
0551301 - Barnum Circus	Automobiles Item 1	2008 Honda Civic LX	1	19,000
	Automobiles Item 2	2008 Ford F-150	2	28,000
	9703 Automobiles	---	---	47,000
	Equip equal to or greater than \$5K Item 1	Wood chipper	3	50,000
	9705 Equipment equal to or greater than \$5,000	---	---	50,000
	Tech equal to or greater than \$5K Item 1	IBM blade server	4	25,000
	9706 Technology equal to or greater than \$5,000	---	---	25,000
	Work of Art Item 1	Bronze bear statue	5	50,000
	9707 Works of Art Collections	---	---	50,000
	Equip less than \$5K Item 1	A/C tools	6	1,000
	9754 Minor Equipment less than \$5,000	---	---	1,000
	Tech less than \$5K Item 1	2 laptop computers	7	3,000
	9756 Minor Technology less than \$5,000	---	---	3,000
	Capital Details	---	---	176,000
Barnum Institute	Capital Details	---	---	176,000

Print Preview



- Click the rollup to see a breakdown of what departments are included. If the user has access to only one department, the department name will display here.



- Click *Preview Options* – Allows the user to change the default report printing settings and print the report

Preview Options

Print Size:

Adjust to: % of normal size

Fit to one page wide

Layout

Print Order: ▼

Orientation: ▼

Page Size: ▼

NOTE: Please match your printer settings with these layout settings.

Print Size:

Adjust to: % of normal size

Fit to one page wide

- Select *Print Size*
 - Enter a percentage of Magnification / Reduction
- OR
- *Fit to one page wide*
Automatically chooses a size consistent with the width of the paper.

Print Order: ▼

Down, then across (N)

Across, then down (Z)

- When reducing the print size, select a Print Order to determine how multiple pages of information will print on one page of paper

Orientation: ▼

Portrait

Landscape

- Choose whether the Printer will print Portrait (8.5 X 11) or Landscape (11 X 8.5)

Page Size: ▼

Letter

Legal

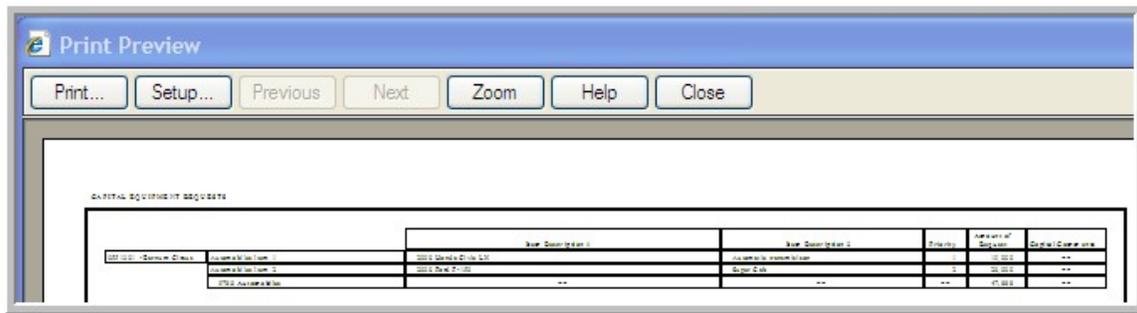
A4

A5

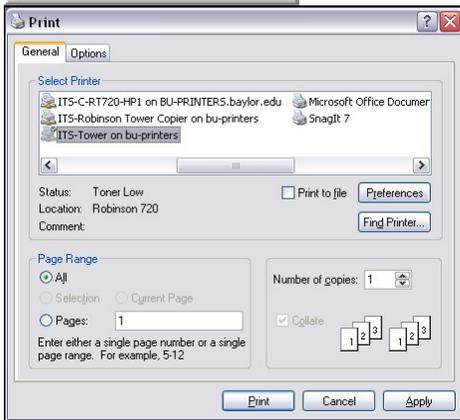
- Select a *Page Size*. This will almost always be **Letter**.



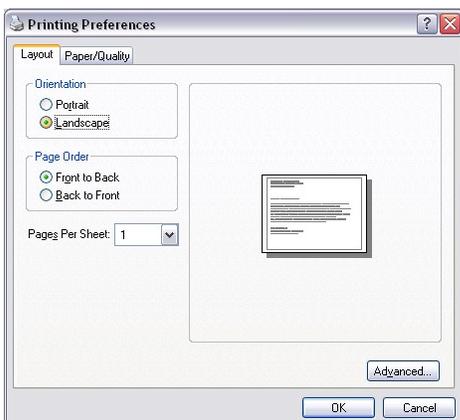
- Click *OK*



- Review the Print Preview
- Click the *Print* button to send the document to the printer

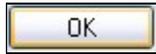


- (Optional) Click *Preferences*
- If preferences have been changed in the print preview process, the same preferences need to be changed in the printer preferences step. Otherwise, the document will print without any changes.





- Click *Landscape* under *Orientation*



- Click *OK*



- Click *Print* on the Print dialog box



- Click *Close* to shut down the window

Quick Print



- Quick Print – Prints the page without changes to the default printing preferences.

Submitting Changes for Approval

Using Approval Workflow via an Input Template

Input Templates

- prep - budget change template
- prep - multi-departmental budget change template

- Click *Budget Change Template* to open the template. This will work from the other templates as well.

	FY 07-08	FY 08-09	Original Budget 2009-10	Adj. Bud Dec. 09	Pre-Calculated Budget 10-11	Proposed Budget 10-11	Variance	Budget Comment 10-11
0651802 - Barnum Clown School								
Gross Revenues	1,555,477	1,164,425	1,389,700	1,296,680	1,344,133	1,344,133	0	0
9120 - Full Time Permanent Employee	0	0	131,000	133,456	138,127	138,127	0	0
912010 - Ft Perm - Admin & Prof	128,855	123,939	0	0	0	0	0	0
915030 - F/IE Supp Comp-Teaching	64,000	0	0	0	0	0	0	0
915090 - F/IE Supp Comp-Other	47,909	0	0	0	0	0	0	0
9163 - Part-Time Lecturers	0	89,500	93,000	97,500	100,913	100,913	0	0
9190 - Budget Fringe Benefits	0	0	43,725	44,487	46,044	46,044	0	0
9191 - Unemployment Comp Reimb	7,544	984	0	0	0	0	0	0
9195 - Group Insurance Plans Distr	15,248	12,619	0	0	0	0	0	0
9197 - Retirement	12,125	9,612	0	0	0	0	0	0
9198 - Social Security	15,016	14,034	0	0	0	0	0	0
9tax Personnel	290,698	250,688	267,725	275,443	285,084	285,084	0	0
9303 - Advertising	342,817	308,970	323,880	260,715	269,840	269,840	0	0
9318 - Contract Services	15,787	16,010	35,000	35,000	36,225	36,225	0	0

- Make changes to the template as necessary



- *Submit* – Save Document



- Click *OK*

- When you exit an input template, you will be prompted to “Submit for Approval”. This step will send the data to the next approval step in the hierarchy. Once an input template is submitted for approval, the data cannot be changed by the original user. Therefore, make sure your data is final before submitting a template for approval. A request that has been *submitted for approval* may or may not eventually be approved.
- However, if the data in the input template is final, you can submit it via the process below.

Select steps to "Submit for Approval":

<input type="checkbox"/>	Workflow Description	Current Status	Warnings
<input checked="" type="checkbox"/>	Budget Change Template : D0551301 - 0551301 - Barnum Circus	In progress	
<input type="checkbox"/>	Budget Change Template : D0551302 - 0551302 - Barnum Clown School	In progress	
<input type="checkbox"/>	Budget Change Template : D0551303 - 0551303 - Menagerie	Not started	
<input type="checkbox"/>	Budget Change Template : D0551304 - 0551304 - Tent Maintenance	Not started	
<input type="checkbox"/>	Budget Change Template : D0551305 - 0551305 - Acrobatics	Not started	
<input type="checkbox"/>	Budget Change Template : D0551306 - 0551306 - Elephant Training	Not started	

Comments: Ready for approval Submit Cancel

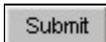
Caution: The status "Submitted for approval" will prevent users from updating the underlying data area.



➤ Click checkbox by the department(s) which are ready to be submitted for approval.

Comments:

➤ Enter *Comments* as necessary.



➤ Click *Submit*. Once the template has been submitted for approval, it may not be updated. An approved request is not an approval of funding.



➤ OR Click *Cancel* to save your changes to the database but not submit the template for approval to the next step in the approval hierarchy.

Note: Once a user has clicked *Submit*, he or she will be locked out of the applicable input template (and no longer able to enter data) unless the key budget contact resets the data to "in progress" using Approval Workflow. It is therefore necessary for users to remember to click *Cancel* each time this screen appears until the input template is complete.

Status changes

To view the updated status of a department, click the *Refresh* button on your web browser. If the status did not change, log out of KLX and then log back in. The new status will now appear under the Approval Workflow section of the home page. If no status data is underneath an Approval Workflow sections, then all required steps have been completed.

Using Approval Workflow via the Home Page

When to use Approval Workflow:

Approval Workflow via the home page should be used only when no further modifications are required to an input template but you still need to submit the data for approval.

Approval Workflow

- Capital Expenditures
 - You have areas that have not been started.
- Personnel Cost Detail
 - You have areas that have not been started.
- Contract Services
 - You have areas that have not been started.
- Budget Change Template
 - You have submissions to approve.
 - You have areas to submit for approval.
 - You have areas that have not been started.

- Watch the *Approval Workflow* window to see outstanding tasks
- Click on a Workflow process (*Budget Change Template* will be our example here) to see all Budget Change Templates

A screen similar to the following will appear:



The screenshot shows a web browser window with the URL: <https://psoft.baylor.edu/?KhalixProcessing=1&KhalixIdentifier=k1xtrn&KhalixWebSID=1000.yLAKLr7Q>. The page title is "Workflow" and the breadcrumb is "Khalix Training Grp11/ Key Budget Contacts - Administrative". The date is 2/14/2007.

The main content area is titled "Budget Change Template" and includes a "Process View" section. There are buttons for "To Hierarchy View" and "Refresh". Below this, there are dropdown menus for "ALL" and "Khalix Training Grp11", and a "View Details" button.

Budget Change Template	Status	Owner
Budget Change Template : WORKBARNUM - Barnum Institute	In progress	Khalix Training Grp11
Budget Change Template : D0551301 - 0551301 - Barnum Circus	In progress	Khalix Training Grp11
Budget Change Template : D0551302 - 0551302 - Barnum Clown School	In progress	Khalix Training Grp11
Budget Change Template : D0551303 - 0551303 - Menagerie	Submitted for approval	Khalix Training Grp11
Budget Change Template : D0551304 - 0551304 - Tent Maintenance	Submitted for approval	Khalix Training Grp11
Budget Change Template : D0551305 - 0551305 - Acrobatics	Submitted for approval	Khalix Training Grp11
Budget Change Template : D0551306 - 0551306 - Elephant Training	Submitted for approval	Khalix Training Grp11

LEGEND

- Click on *Legend* in the upper-left corner of the screen to make the following key appear:

Legend

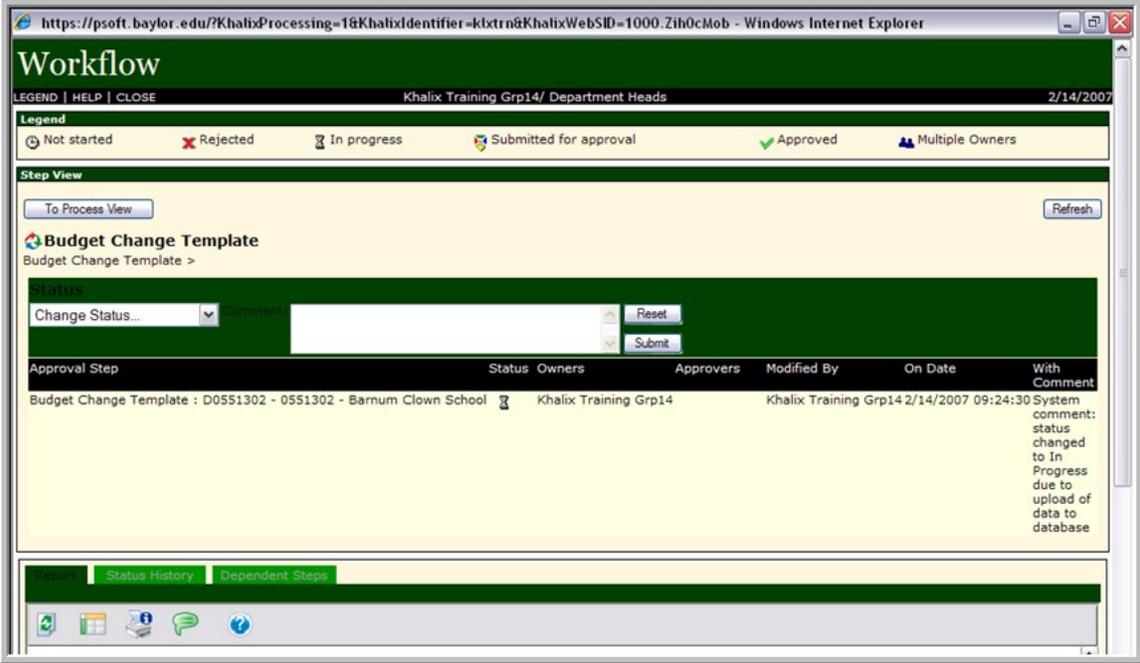
 Not started
  Rejected
  In progress
  Submitted for approval
  Approved
  Multiple Owners

[To Hierarchy View](#)

- Click on Hierarchy View to see departments in order

[0551301 - Barnum Circus](#)

- Click the department to submit for approval and the following screen will appear:



[Change Status...](#)

- Click the arrow to the right of *Change Status* for all available options to appear



- Select *Submitted for approval* to send the department request to the next level for review

- Enter any *comments* regarding the change in status

- Click *Submit* to change the status of the department.

- Once the template has been submitted, it may not be updated. A request that has been submitted may or may not eventually be approved

The following screen will appear after the *Submit* button has been clicked:

Confirm Status Change

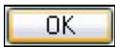
Caution: The status "Submitted for approval" will prevent users from updating the underlying data area.

Approval Step	From Status	To Status	With Comment
<input checked="" type="checkbox"/> Budget Change Template - 0551301 - Barnum Circus	⌚	🏆	This is a comment

Status will be changed. Do you wish to continue?



- Make sure the box to the left of the department contains a check-mark.



- Click the *OK* button to submit the department for approval



- Click *Cancel* to not submit the department

Status Change Result

Approval Step	From Status	To Status	Result
Budget Change Template - 0551301 - Barnum Circus	⌚	🏆	Successful



- Click *Continue* to go back to the previous view – the *Status* box is now gone and  now appears in the Status column

Step View

Budget Change Template

Budget Change Template > Budget Change Template - Barnum Institute >

Status

Change Status...

Approval Step	Status	Owners	Approvers	Modified By	On Date	With Comment
Budget Change Template - 0551301 - Barnum Circus	🏆		Khalix Training Grp11	Khalix Training Grp11	10/11/2006 16:17:58	This is a comment

Your department has now been submitted for approval. Close out of Workflow by clicking the *X* in the upper right hand corner of the screen or return to the Home Page to sign off.

Changing the Orientation to select a specific department

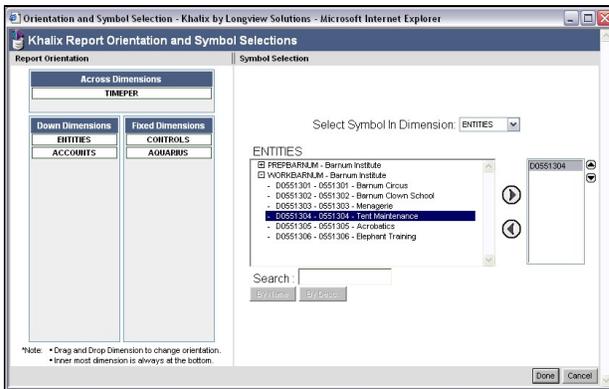
If the user is working with more than one department, the reports and input templates can get a little cumbersome. Use the *Orientation and Symbol Selection* tool to narrow the information on the template to only one department.

BAYLOR UNIVERSITY
BUDGET CHANGE SUMMARY REPORT 2010/11
0551302 - Barnum Clown School
0551303 - Menagerie
0551304 - Tent Maintenance

	Original Budget 2009/10	Adj Bud Dec 09	Pre-Calculated Budget 10/11	Proposed Budget 10/11	Variance	Budget Comment 10/11
0551302 - Barnum Clown School						
Gross Revenues	1,389,700.00	1,298,680.00	1,344,133.00	1,344,133.00	----	----
Net Revenues	1,389,700.00	1,298,680.00	1,344,133.00	1,344,133.00	----	----
91xx Personnel	267,725.00	275,443.00	285,084.00	285,084.00	----	----
93xx General Operating	763,801.22	678,216.22	701,954.00	701,954.00	----	----
98xx Distributed Expense	194,504.00	194,225.00	190,673.00	190,673.00	----	----
Expenses	1,226,030.22	1,137,884.22	1,177,711.00	1,177,711.00	----	----
Statement of Revenues & Expenses	163,669.78	160,795.78	166,422.00	166,422.00	----	----
0551303 - Menagerie						
Scholarships	38,256.00	32,150.00	33,286.00	33,286.00	----	----
Net Revenues	-36,256.00	-32,160.00	-33,286.00	-33,286.00	----	----
91xx Personnel	445,135.00	385,648.00	400,180.00	400,180.00	----	----
92xx Student Wages & Fellowships	39,358.00	29,179.00	30,200.00	30,200.00	----	----
93xx General Operating	84,887.41	102,715.41	105,311.00	105,311.00	----	----
97xx Capital Expenditures	140,193.00	92,877.00	95,128.00	95,128.00	----	----
98xx Distributed Expense	----	80,000.00	82,100.00	82,100.00	----	----
Expenses	719,553.41	671,417.41	694,919.00	694,919.00	----	----
Statement of Revenues & Expenses	-755,809.41	-703,577.41	-728,205.00	-728,205.00	----	----
0551304 - Tent Maintenance						
Gross Revenues	451,622.00	485,939.00	503,982.00	503,982.00	----	----
Net Revenues	451,622.00	485,939.00	503,982.00	503,982.00	----	----
91xx Personnel	190,700.00	106,800.00	110,539.00	110,539.00	----	----
92xx Student Wages & Fellowships	-37,089.00	-49,854.00	-51,402.00	-51,402.00	----	----
93xx General Operating	112,373.00	118,885.00	122,735.00	122,735.00	----	----
97xx Capital Expenditures	----	113,023.00	116,979.00	116,979.00	----	----
98xx Distributed Expense	-340,005.00	-349,291.00	-351,516.00	-351,516.00	----	----
Expenses	-74,021.00	-80,547.00	-82,666.00	-82,666.00	----	----
94xx Transfers	12,535,212.00	12,575,212.00	13,015,345.00	13,015,345.00	----	----
Statement of Revenues & Expenses	-12,009,958.00	-12,027,726.00	-12,448,697.00	-12,448,697.00	----	----



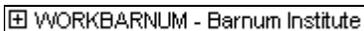
➤ Click *Orientation and Symbol Selection*



Select Symbol In Dimension:



➤ Select **Entities** (This is the Khalix term for **Department**) from the drop down box by *Select Symbol in Dimension*



➤ Click the Plus Sign (“+”) by *Work*

- Prep = All Departments
- Work = All *Active* Departments

- WORKBARNUM - Barnum Institute
- WORKBARNUM - Barnum Institute - Academic Section
 - D0551303 - 0551303 - Administration
 - D0551304 - 0551304 - Repairs & Maintenance
 - D0551305 - 0551305 - Foreign Seminars
 - D0551306 - 0551306 - Training

➤ Highlight one of the list of department numbers which appears



➤ Click the right-pointing arrow to remove the previous selected symbol



➤ Click the left-pointing arrow to select the department

Done

➤ Click *Done*

OR Search by department by:

Select Symbol In Dimension:

ENTITIES

➤ Select **Entities** (This is the Khalix term for **Department**) from the drop down box by *Select Symbol in Dimension*

Search : D0551304

➤ Enter the Department Number with the Letter "D" in front of it.

By Name

➤ Click *By Name* or press *Enter*



➤ Click the right-pointing arrow to remove the previous selected symbol



➤ Click the left-pointing arrow to select the department

Done

➤ Click *Done*

This will display the report or template with only one entity.

BAYLOR UNIVERSITY BUDGET CHANGE SUMMARY REPORT 2010/11 0551302 - Barnum Clown School							
		Original Budget 2009/10	Adj Bud Dec 09	Pre-Calculated Budget 10/11	Proposed Budget 10/11	Variance	Budget Comment 10/11
0551302 - Barnum Clown School	Gross Revenues	1,389,700.00	1,298,880.00	1,344,133.00	1,344,133.00	----	----
	Net Revenues	1,389,700.00	1,298,880.00	1,344,133.00	1,344,133.00	----	----
	9100 - Personnel	267,725.00	275,443.00	285,084.00	285,084.00	----	----
	9303 - Advertising	323,880.00	260,715.00	269,840.00	269,840.00	----	----
	9318 - Contract Services	35,000.00	35,000.00	36,225.00	36,225.00	----	----
	9332 - Equipment Not Owned By Baylor	44,000.00	32,753.00	33,899.00	33,899.00	----	----
	9333 - Food Expense	88,835.00	88,835.00	91,944.00	91,944.00	----	----
	9340 - Honorarium & Professional Fees	5,000.00	5,000.00	5,175.00	5,175.00	----	----
	9342 - Guests & Entertainment	7,004.00	7,004.00	7,249.00	7,249.00	----	----
	9343 - Housing Expense	62,622.00	62,622.00	64,360.00	64,360.00	----	----
	9358 - Memberships	1,500.00	1,500.00	1,553.00	1,553.00	----	----
	9359 - Postage	3,000.00	3,000.00	3,105.00	3,105.00	----	----
	9360 - Repairs and Maintenance	1,000.00	1,000.00	1,035.00	1,035.00	----	----
	9367 - Recruiting Students	5,000.00	5,000.00	5,175.00	5,175.00	----	----
	9370 - Supplies	55,333.47	55,333.47	57,270.00	57,270.00	----	----
	9371 - Duplicating/Copier Services	1,228.75	1,228.75	1,270.00	1,270.00	----	----
	9372 - Printing	2,000.00	2,000.00	2,070.00	2,070.00	----	----
	9376 - Telephone Expense	5,000.00	5,000.00	5,175.00	5,175.00	----	----
	9382 - Travel - Individual	20,000.00	20,000.00	20,700.00	20,700.00	----	----
	9389 - Travel - Group	98,500.00	98,500.00	101,948.00	101,948.00	----	----
	9389 - Miscellaneous Oper Exp	15,000.00	3,327.00	3,561.00	3,561.00	----	----
	9300 General Operating	763,891.22	678,216.22	701,954.00	701,954.00	----	----
	9300 Distributed Expense	194,604.00	194,625.00	190,873.00	190,873.00	----	----
	Expenses	1,226,030.22	1,137,884.22	1,177,711.00	1,177,711.00	----	----
	Statement of Revenues & Expenses	163,669.78	160,795.78	166,422.00	166,422.00	----	----

Available Icons

Template Input Icons



- Report View – Changes the window to display only reporting mode (see example next page).



- Orientation and Symbol Selection – Allows the user to change the format of the report.



- Calculate – Allows the user’s changes to be displayed in the window totals.



- Refresh Data – Pulls a fresh copy of the data from the database.



- **Any changes entered since the last *Submit* will be lost.**

- *Submit* – Save data and update template (use frequently).

Note: This is different from the template being *submitted for approval*, which sends the template to the next user in the hierarchy. Only *submit for approval* if all data submission is complete. For more information on *submitting for approval*, see “Submitting Changes for Approval” section or click [here](#).



- Export to Excel – Save the currently displayed data to an Excel spreadsheet. For more information, see “Download Data to Excel” section or click [here](#).



- Help – Brings up Khalix help pages.

Template Report Icons



- Return to Input Mode – Changes the window from Report Mode to where data may be input.



- Print Preview Options – Allows the user to change the default report printing settings and print the report



- Quick Print – Prints the page without changes to the default printing preferences.



- Show Comments – This option will not be used in the current implementation of the software.



- Export to Excel – Save the currently displayed data to an Excel spreadsheet. For more information, see “Download Data to Excel” section or click [here](#).



- Help – Brings up Khalix help pages.



Report Icons



- Refresh Data – Pulls a fresh copy of the data from the database.
- Refreshing data in a report will not cause loss of unsaved data. Doing so in an input template will cause loss of unsaved data.



- Orientation and Symbol Selection – Allows the user to change the format of the report.



- Print Preview Options – Allows the user to change the default report printing settings and print the report



- Quick Print – Prints the page without changes to the default printing preferences.



- Show Comments – This option will not be used in the current implementation of the software.



- Export to Excel – Save the currently displayed data to an Excel spreadsheet. For more information, see “Download Data to Excel” section or click [here](#).



- Help – Brings up Khalix help pages.