Longview Solutions

KLX (Khalix)
DeskCard©

HelpDeskCards
Essential Computer Training
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KLX Home Page At A Glance

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KLX Documentation
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Revenues Variance
Budget Used
Operating Expenses Variance
Year Over Year Comparison

KLX Reports

Revenues Variance Report:
➤ Shows what percentage revenues vary from projections:
- Green – > 0% variance
- Yellow – -1 to -3% variance
- Red – >- 5% variance

Click the *Revenues Variance* dial to see a detail report
OR click *Revenues Gauge* under Report Templates

Operating Expenses Variance Report:
➤ Shows what percentage operating expenses vary from projections:
- Green – <0% variance
- Yellow – 1 to 3% variance
- Red – > 5% variance

Click the *Operating Expense Variance* dial to see a detail report
OR click *Operating Expense Gauge* under Report Templates

Operating Balances Report ($ Bill):
➤ Compares current year budget to previous year budget at same time:
- Green – Less than last year
- Red – More than last year
- Blue – Last year's budget

Click the *$ Bill* graphic to see a detail report
OR click *Operating Balances* under Report Templates

Total Expenditures Comparison Report:
➤ Compares expenses in current year to same time last year. Presented as stack bar graph.

Click the *Total Expenditures* chart to see a detail report
OR click *Stack Bar Expenses* under Report Templates
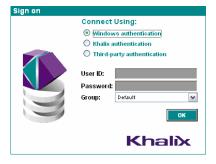
KLX Basics

To Sign In to KLX:
➤ Open Internet Explorer®

➤ Go to http://www.baylor.edu/klx

➤ Click *OK*

Note: Be sure pop-ups will not be blocked

To Sign Off of KLX:
➤ Click *Sign Off* on the bar underneath the Baylor Logo

Contact:
➤ Christian Heger in the Budget Office (x.8617) with Questions about using KLX

Changing Passwords

Note: Users will not need to enter a password to log in to KLX as long as they are signed on to Windows with their Bear_ID and password.
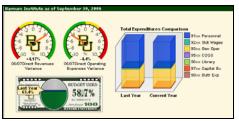
To Change the Windows Networking Password:
➤ Open Internet Explorer®
➤ In the Address field, type: www.baylor.edu/passwordchange
➤ Press *Enter*

➤ Enter *User Name* (Bear_ID)
➤ Enter *Password* (Old password)
➤ Click *OK*

➤ Enter your security question
➤ Answer your security question
➤ Enter your password
➤ Confirm this password
➤ Click *Submit*

Input Templates	Reports / Approval	Toolbar Buttons

Input Templates:

Input Templates
- prep - capital template
- prep - budget input template
- prep - contract services template

Using Input Templates:

➤ Click a template in the *Input Templates* box to open the template

➤ Click on the "Plus" signs to "drill-down" through the groupings to the particular department you want

➤ Change fields with Black Fonts (Blue fonts are "Read Only")

➤ When complete, click the *Submit* button to save

Workflow status of prep - budget input template

Select steps to "Submit for Approval":

Workflow Description	Current Status	Warnings
Budget Changes - 0551301 - Research	Not started	
Budget Changes - 0551302 - Language Institute	Not started	
Budget Changes - 0551303 - Administration	Not started	
Budget Changes - 0551304 - Repairs & Maintenance	Not started	
Budget Changes - 0551305 - European Seminars	Not started	
Budget Changes - 0551306 - Training	In progress	

Comments:

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

➤ If ready to *Submit for Approval*, select the department from the *Submit for Approval* dialog box and click *Submit*

Note: Firefox® and MacIntosh browsers are not supported

Report Templates:

Report Templates
- bg - operating balances
- bg - operating expenses gauge
- bg - revenues gauge
- bg - year over year comparison
- prep - budget changes report
- prep - capital equipment report
- prep - contract services report
- prep - proposed budget report

Printing a Report:

➤ Click *Preview Options*
➤ Select *Print Size*
➤ Select *Orientation*
➤ Click *OK*
➤ Review Print Preview
➤ Click the *Print* button on the toolbar
➤ Click *Print*

How to Submit a Workflow for Approval:

Approval Workflow:
Do not *submit for approval* until all changes have been made. After being submitted for approval, a department cannot be changed. An approved request is not an approval of funding.

Approval Workflow
- Capital Expenditures
  - You have areas to submit for approval.
  - You have areas that have not been started.
- Personnel Cost Detail
  - 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.
- Budget Prep Change Template
  - You have areas to submit for approval.
  - You have areas that have not been started.

Approve Budget Templates:
➤ Click one of the main category headings under *Approval Workflow*
➤ Click the *Department* to select for approval
➤ Select the *Status* **Submitted for Approval** the drop-down list.
➤ Enter *Comments*
➤ Click *Submit*
➤ Click *OK* when asked *Status will be changed. Do you wish to continue?*
➤ Click *Continue*
➤ Click *To Process View*

KLX Icons:

➤ Refresh data –
Pulls a fresh copy of the data from the database. In an input template, any changes entered since the last Submit will be lost (not in reports).

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

➤ Export to Excel – Saves the currently displayed data to an Excel spreadsheet.

➤ 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.

➤ Report View –
Change to display only reporting mode.

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

➤ Calculate –
Allows the users changes to be displayed in the window totals.

➤ Disable Conditional Displays – Display accounts with zero balances.

➤ Submit – Click to save your changes.
➤ When closing an input template, the *Submit for Approval* dialog box appears to allow the user to send the template to the next level for review. Once the template has been "submitted for approval", it may not be updated.

➤ Help –
Brings up KLX help pages.