

Overview:

The KC budget tool automatically 'groups' assigned personnel by cost element (object code and G/L); meaning if you add two project personnel as Summer Faculty, for example, two rows, one for each person, appear in a Cost Element group of the same name. Each person will have their own line with a **Details** button, but the cost object group has a single **Details & Rates** maintenance window. **Any edits to the Details & Rates for the Cost Element affect ALL persons in that group.**

Person	Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe	Actions
Summer Faculty - On ← 1 Cost Element								
1 Haskell, Edward	06/01/2016	08/31/2016	75.00	75.00	Summer	23175.00	5330.25	Details & Rates
2 Hensler, Judith	06/01/2016	08/31/2016	75.00	75.00	Summer	15450.00	3553.50	Details

2 Rows - (1 for each person budgeted under the Cost Element)

Figure 1 – Default Cost Element Grouping

The KC Group tool is used to **override** the default **Cost Element** grouping.

Person	Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe	Actions
Summer Faculty - On (No Inflation) ← Example of a Group								
Hensler, Judith	06/01/2016	08/31/2016	75.00	75.00	Summer	15000.00	3450.00	Details & Rates
Summer Faculty - On								
Haskell, Edward	06/01/2016	08/31/2016	75.00	75.00	Academic	23175.00	5330.25	Details & Rates

Separate Details & Rates

Figure 2 - Groups

The KC Group tool is generally used for the following:

- To isolate one project person so they will **not** be automatically grouped to the default cost element group so you can edit the **Details & Rates** for **only** that person.
- Groups are useful if you will have one or multiple persons with special charges, such as off-campus F&A rate, no inflation, or submit/do not submit cost sharing detail.

Procedure:

To create a new Group:

1. While in the Budget, click the **Personnel Cost** → **Assign Personnel to Periods** in the **Navigation** panel. The **Assign Personnel to Periods** screen will open with Period tabs displayed at the top (Period 1 is the default display).

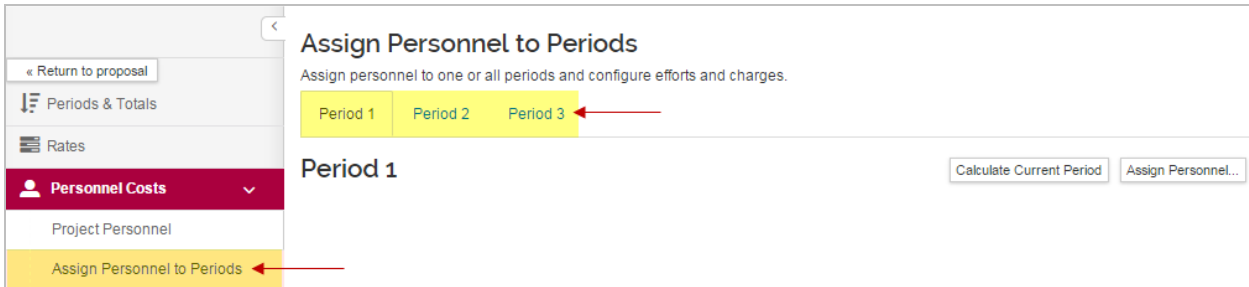


Figure 3 – Assign Personnel to Periods Subpanel

2. In the **Assign Personnel to Periods** screen, click the **Assign Personnel...** button.

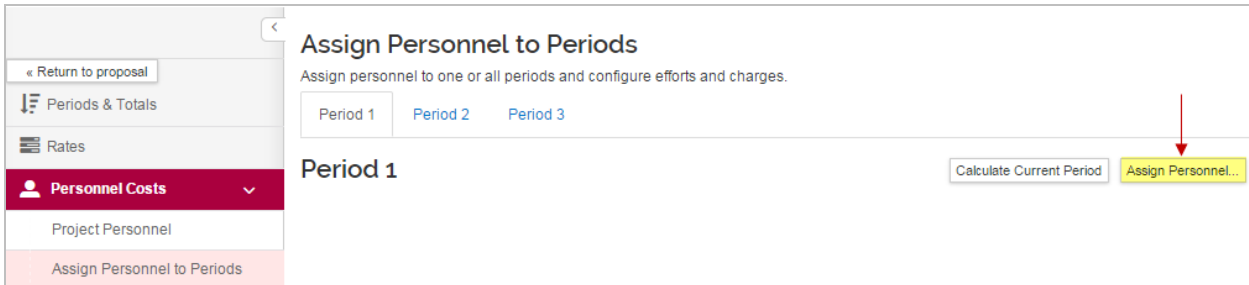


Figure 4 – Assign Personnel... Button

The **Add Personnel to Period** window will appear.

Figure 5 – Assign Personnel to Period Window

- In window, follow the standard entry steps for assigning personnel (select a person, object code, enter dates, effort, charged, and period).
- Click the **Group** drop-down field and select **Create New Group**.

The screenshot shows a window titled "Add Personnel to Period" with the following fields:

- Person:** * Hensler, Judith (0)
- Appointment Type:** 9M DURATION
- Salary Effective Date:** 06/01/2015
- Object Code:** * Summer Faculty - On
- Group:** A dropdown menu is open, showing "Default" and "Create New Group" (highlighted in green). A red arrow points to "Create New Group".

Figure 6 – Creating New Group

A **New Group Name** field will generate below the **Group** field:

The screenshot shows the same "Add Personnel to Period" window, but now the **Group** dropdown is set to "Create New Group". Below it, a new field labeled **New Group Name:** is highlighted in yellow. A red arrow points to this field.

Figure 7 – New Group Name

- Enter a name for the Group into the **New Group Name** field.

This is a close-up of the **New Group Name:** field. The text "No Inflation" is entered into the field, and a red arrow points to the text.

Figure 8 – Example of a Group Name



Note: The Group Name assigned will appear in the Heading next to the Cost Element Name.

6. Complete the remaining required fields and then click the **Assign to Period 1** button.
7. The person will be added to the period detail list, in a new Cost Element header line. The header will have the **Cost Element** name and the **Group** name in parenthesis.

Person	Start	End	Effort	Charged	Period Type	Requested Salary	Calculated Fringe	Actions
Summer Faculty - On (No Inflation) Details & Rates								
Hensler, Judith	06/01/2016	08/31/2016	75.00	75.00	Summer	15450.00	3553.50	Details
Summer Faculty - On Details & Rates								
Haskell, Edward	06/01/2016	08/31/2016	50.00	50.00	Summer	15450.00	3553.50	Details

Figure 9 – Added Personnel Cost with New Group



Note: A Group can only be added when a person is **initially** being assigned to the period. If the person row already exists, you must delete the row and then add them back to the group selected. Once a group has been created in a proposal budget version, it is available for selection from the Group drop-down list.

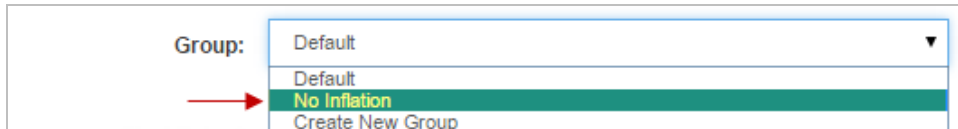


Figure 10 – Group Drop-Down List

Getting Help:

For questions or problems using this Quali Coeus Quick Reference Card, email the Support Team at kc-help@mit.edu.

Include your **Name**, **Contact Information**, and the **questions** you have and or **difficulties** you are experiencing.