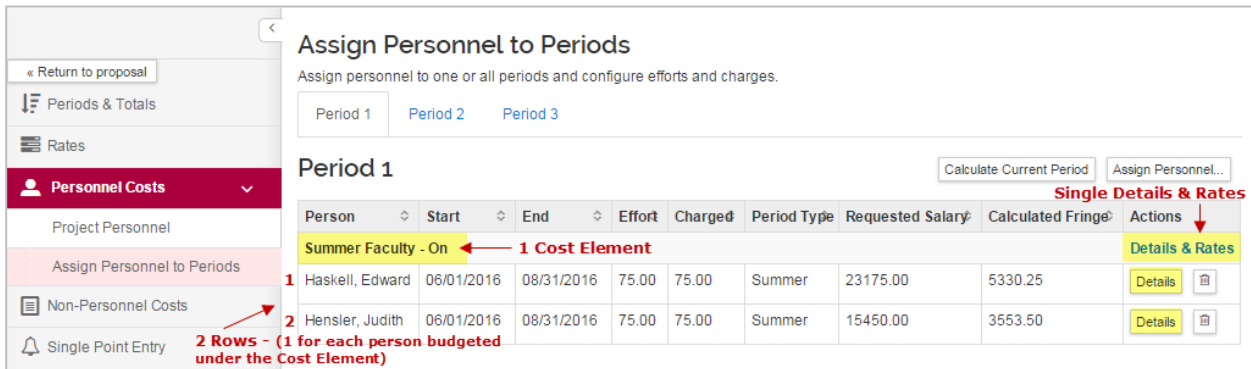


Overview:

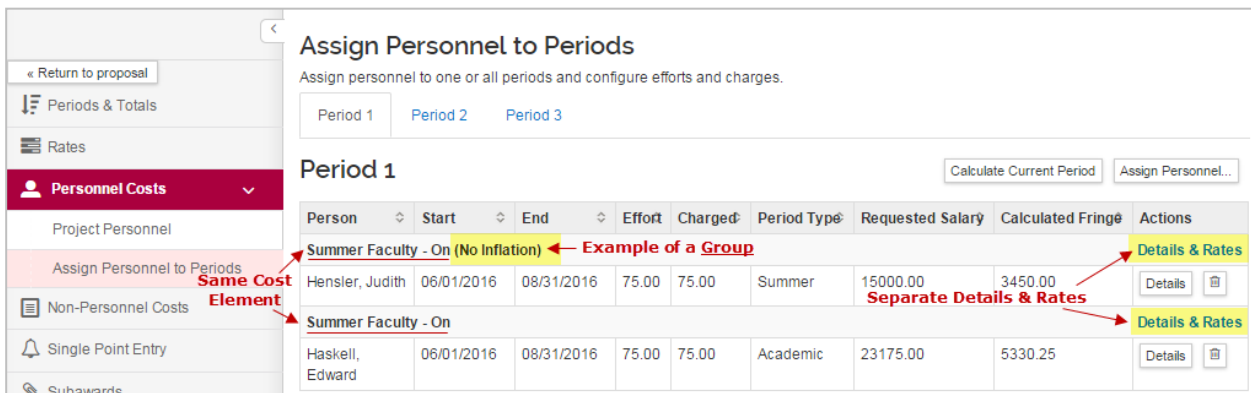
The KC budget tool automatically 'groups' assigned personnel by cost element (object code and G/L); meaning if you add two project personnel as Summer Faculty, for example, two rows, one for each person, appear in a Cost Element group of the same name. Each person will have their own line with a **Details** 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

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

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).

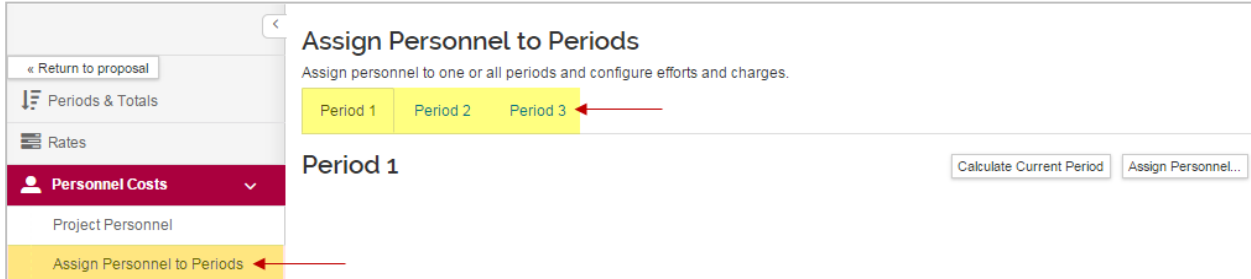


Figure 3 – Assign Personnel to Periods Subpanel

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

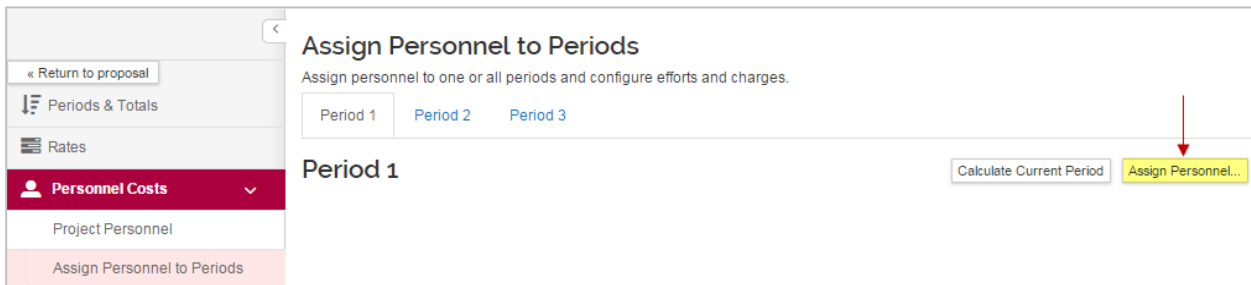


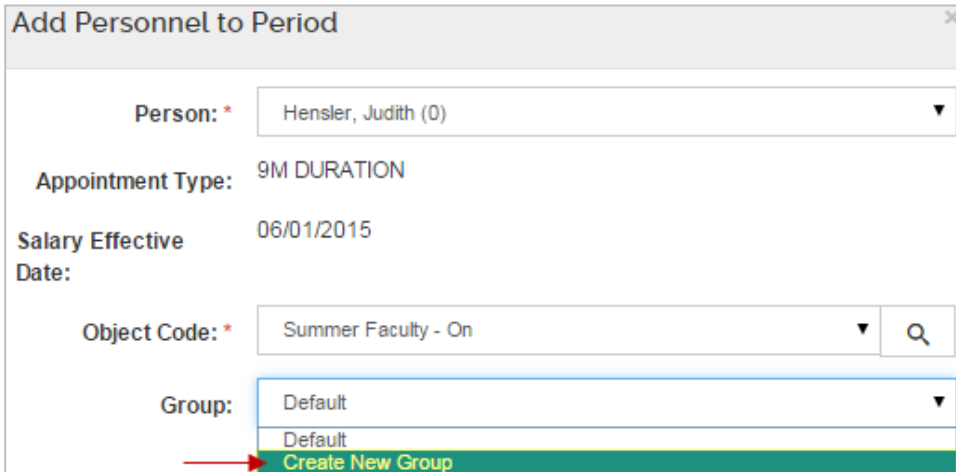
Figure 4 – Assign Personnel... Button

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

Figure 5 – Assign Personnel to Period Window

3. In window, follow the standard entry steps for assigning personnel (select a person, object code, enter dates, effort, charged, and period).

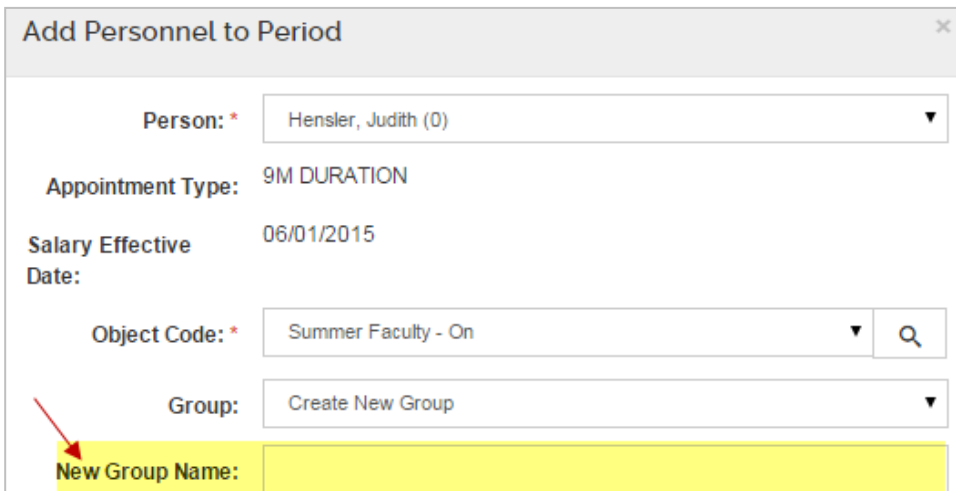
4. Click the **Group** drop-down field and select **Create New Group**.



The screenshot shows a web form titled "Add Personnel to Period". The form contains several fields: "Person:" with a dropdown menu showing "Hensler, Judith (0)"; "Appointment Type:" with the value "9M DURATION"; "Salary Effective Date:" with the value "06/01/2015"; "Object Code:" with a dropdown menu showing "Summer Faculty - On" and a search icon; and "Group:" with a dropdown menu that is open, showing "Default" and "Create New Group" (highlighted in green). A red arrow points to the "Create New Group" option.

Figure 6 – Creating New Group

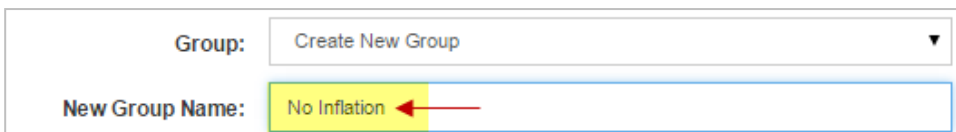
A **New Group Name** field will generate below the **Group** field:



The screenshot shows the same "Add Personnel to Period" form. The "Group:" dropdown menu now shows "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

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



The screenshot shows the "Add Personnel to Period" form. The "Group:" dropdown menu shows "Create New Group". The "New Group Name:" field now contains the text "No Inflation". A red arrow points to the text in the field.

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.

Assign Personnel to Periods
Assign personnel to one or all periods and configure efforts and charges.

Period 1 Period 2 Period 3

Period 1 Calculate Current Period Assign Personnel...

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.

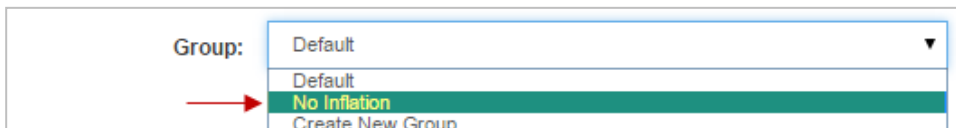


Figure 10 – Group Drop-Down List

Getting Help:

For questions or problems using Quali Coeus, email the RAS Support Team at ra-help@mit.edu. Include your **Name**, **Contact Information**, and the **Proposal Number**.