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.

Figure 1 – Default Cost Element Grouping

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

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).

![Assign Personnel to Periods Subpanel](image)

Figure 3 – Assign Personnel to Periods Subpanel

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

![Assign Personnel... Button](image)

Figure 4 – Assign Personnel... Button

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

![Add Personnel to Period Window](image)

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**.

![Figure 6 - Creating New Group](image)

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

![Figure 7 - New Group Name](image)

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

![Figure 8 - Example of a Group Name](image)

\[Note\]: 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.
**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.

**Getting Help:**

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