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.

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

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](image1)

Figure 3 – Assign Personnel to Periods Subpanel

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

![Assign Personnel… Button](image2)

Figure 4 – Assign Personnel… Button

The Add Personnel to Period window will appear.

![Add Personnel to Period Window](image3)

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.

![Figure 9 – Added Personnel Cost with New Group](image)

**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](image)

**Getting Help:**

For questions or problems using this Kuali 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.