StarPM: Job Budgeting

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User Guide

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Contents

Introduction

StarPM: Job Budgeting enables budgets to be defined and maintained for Staff and/or Staff Types at the Charge Account level within each Stage of a Job.

The Job Budgets tab is the module's home page. The first view on login, it automatically displays any existing Job Budgets previously selected by the currently logged-in user.

Other budgets can be added to the Job Budgets home page via selection of the appropriate Job; existing budgets can be edited or deleted; and a new budget can be set up for any Job currently without a budget. All of these options are available via the module's main toolbar.

Prerequisite Setup

Before Staff can use StarPM: Job Budgeting, an administrator must complete various set-up tasks, each of which is detailed in the Setup appendix to this document.

Entity-level Functional Currency Processing

StarPM: Job Budgeting supports Entity-level Functional Currency Processing.

When this functionality is active (on):

- All rate processing is based on the Entity-level Functional Currency.
- **Entity Currency** columns in both the Job Budgets home page and the Budget Approvals tab display the Entity-level Functional Currency for each Job.
- In open budgets, the Entity-level Functional Currency is displayed in the **Job Details** region of the Details sub-tab.

When Entity-level Functional Currency functionality is inactive (off), all processing is from the perspective of a Firm-level functional currency.

Replace Terms

Many of the standard terms used throughout any 'vanilla' installation of StarPM can be replaced by synonyms. This is useful, for instance, when Star terminology does not reflect the standard lexicon of your organisation. Star refers to such synonyms as Replace Terms.

This Help manual uses standard terms throughout.

If your organisation has defined any Replace Terms in Star, you can record them for future reference against the relevant Standard Terms in the Table of Replace Terms included at the end of this document.

Getting Started

This topic describes only outline procedures, with links to the relevant topics where you will find further details.

The initial StarPM: Job Budgeting view is the Job Budgets tab, which is the module's home page. It is blank when it is accessed for the first time.

To view existing budgets, you must populate the home page by Job selection. To do this:

1. Click **Select Jobs** in the main toolbar.

   The Job List Selector is displayed.

2. In the Job List Selector, search for and select each relevant Job to compile a Job List, and click **Close**.

   The Job List Selector is closed, and the Job Budgets tab is populated with details of the Selected Jobs.

To select a budget for editing, thus populating the Selected Budget tab:

1. Select a budget in the Job Budgets tab.
2. Click **Edit Budget**.

To create a budget:

1. In the main toolbar tab, click **New Budget**.

   Since every budget must be associated with a Job, the Job Selector is displayed.

2. In the Job Selector, locate and select the Job for which you want to create a budget.

   The Budget Setup window is displayed.

3. In the Budget Setup window, define the parameters of the new budget.

   When the Budget Setup is completed a new row representing the new budget is inserted into the main grid in the Job Budgets tab.

The Main Toolbar

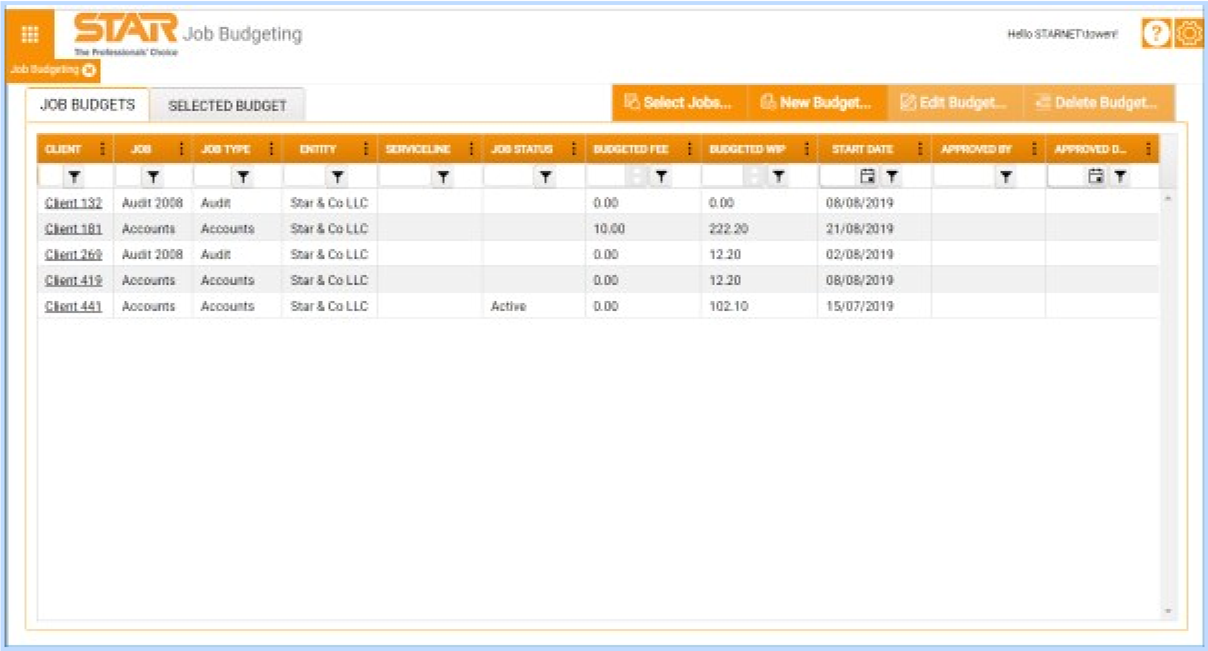
The main toolbar presents the following options:

- **Select Jobs** - Displays the Job List Selector, in which to search for and select one or more Jobs with which to populate the Job Budgets tab.
- **New Budget** - Displays the Job Selector, in which to search for and select the Job for which you want to create a budget. On Job selection, the Budget Setup window is displayed.
- **Edit Budget** - Active only when a budget is selected in the Job Budgets tab. Populates the Selected Budget tab with details of the selected Budget.
- **Delete Budget** - Active only when a budget is selected in the Job Budgets tab. Displays a prompt for confirmation. If you click **Yes** in this dialog all budgeting data for the Job is deleted.

Job Budgets: The Home Page

The **Job Budgets** tab is the Job Budgeting home page. Here you can edit, view or approve existing budgets.

Edit, view and approve functions are all dependent upon user privileges.



The **Job Budgets** tab automatically displays those Job Budgets (if any) last selected by the currently logged-in user. An alternative budget selection can be made by first selecting the appropriate Job, as described below.

Opening a Budget

When accessed for the first time, the Job Budgets tab must be populated by Job selection. Click **Select Jobs** in the main toolbar to display the Job List Selector.

In a populated **Job Budgets** tab, to open a Job Budget for editing, either:

a. Select a budget in the Job Budgets grid and click **Edit Budget**, or
b. Click the hyperlink in the **Name** column on the appropriate budget row.

In either case, the details of the selected budget are displayed for editing in the **Selected Budget** tab, which is then re-titled with the name of the selected budget. See Editing a Budget.

Paging

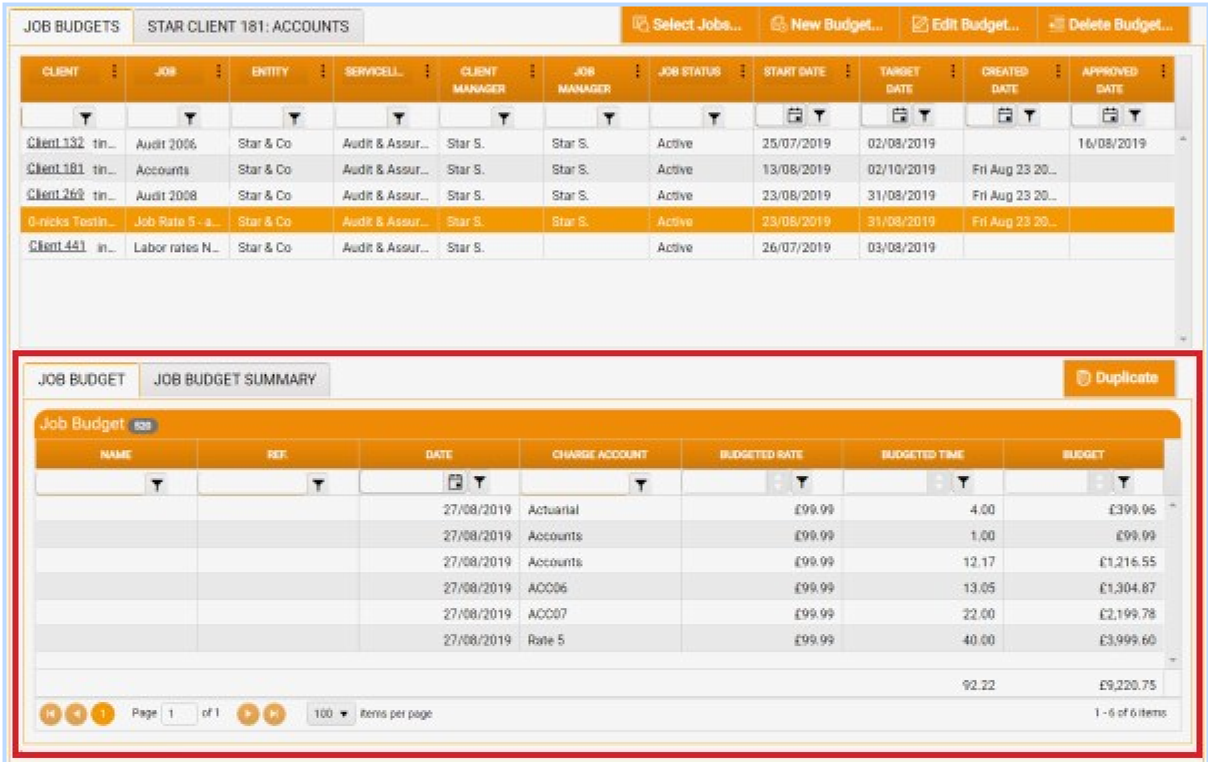
The Job Budgets grid view is paged. Pages are represented – and can be navigated - by the 'index' of numbered circles at the foot of the grid, alongside Go to Previous/Go to Last, etc.

The number of rows displayed in each page is limited to a maximum of 1000 by default, although this might be extended to a limit of 5,000 in your organization's implementation of StarPM: Job Budgeting.

Reporting Tabs

Reporting tabs can be displayed beneath the main Job Budgets grid to provide information relating to any Job Budget currently selected in the main grid, allowing you to review the details of each budget without having to open them.

Reporting tabs may not be available in your organisation's implementation of StarPM: Job Budgeting. Where available, they can be configured (in StarPM: Dashboard) to display any information stored in the Star database, and will be specific to your organization's implementation. The screenshot below illustrates one example only (outlined in red).



Duplicate opens a duplicate display of the reporting tabs, uncluttered by other tabs and toolbars, in a new Web Browser window. The window displaying the main module remains open, and you can navigate both views independently.

Creating a Budget

The Budget Setup window (illustrated below) enables you to define a new Job Budget, either from a template or from a previous budget of the same type. It is accessed by clicking the **New Budget** option on the main toolbar.

Budgets cannot be created for Self-Scheduling Jobs, which must use Mini-Budgets.

In this window:

1. **Start Date** - Click the calendar icon to the right of this field to select the budget Start Date from a drop-down calendar control.

   The dating of Stages in StarPM differs from the dating of Stages in Star PDM. In StarPM dating starts from the first Stage and the Start Date entered, with Stages dated sequentially (as in Job Rollover); in Star PDM, conversely, dating starts from a date one year from the current system date, with stages dated in reverse.

3. **Create From** - If you want to create the new budget from a template, select **Global Templates**. If you want to base the new budget on a previous budget of the same type, select **Previous Engagement**. The remaining fields differ according to your selection.

   Templates must be set up in Star PDM before they can be selected here.

4. Complete the fields above the **Prior Year Job Link** control according to your selection in step 3, following the procedures outlined below: either Setup from Global Template or Setup from Previous Engagement.
5. **Prior Year Job Link** - Click the ellipsis button to display the Job Selector - Budget Prior Year, in which you can select a Job with a prior year budget that you want to use as the basis for the new budget.
6. When you have defined the new budget, click **Create**.

   If Staff Rates have not been set for the Job Type of any Staff associated with the Job, then before the budget is created the Staff Rate Assignment window is displayed for you to assign those Staff Rates.

   The following are applicable only if the Job is configured to use Labour Rates:

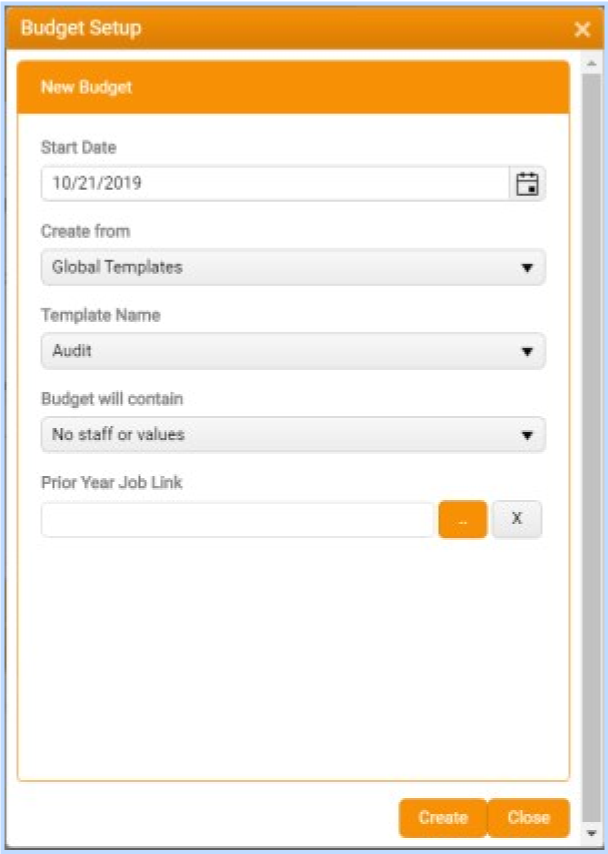
   - If Labour Categories have not been set for any Staff Type associated with the Job, then before the budget is created the Staff Types Labour Category Assignment window is displayed for you to assign those Labour Categories.
   - If the budget's current configuration would not permit Staff to post time to the Job, you will receive a Budget Creation Cannot Continue notification.

7. When the budget setup is complete, a **Budget Creation** dialog displays the confirmation message "Budget creation complete". Click **OK** to close the dialog.

   The new Job Budget is listed in the Job Budgets tab.

Setup from Global Templates

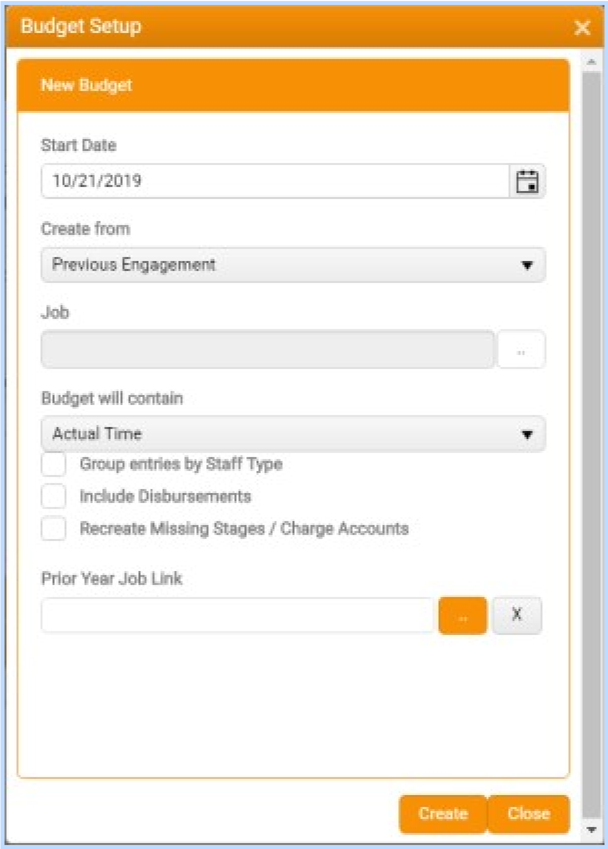
If, in step 3 of the budget setup procedure above, you selected **Create From**: **Global Templates**:



1. **Template Name** - Select the appropriate template for the budget. The drop-down menu includes all Budget Templates specified for the Job Type. If there are none, an error messge is dispayed to that effect
2. **Budget will Contain** - Select one of the following options:
   - **Staff and Values** - The new budget will contain any Staff Types, Stages and date values defined in the template.
   - **No Staff or Values** - The new budget will include Stages from the template, but no Charge Accounts or Staff Types.

Setup from a Previous Job

If, in step 3 of the budget setup procedure above, you selected **Create From**: **Previous Engagement**:

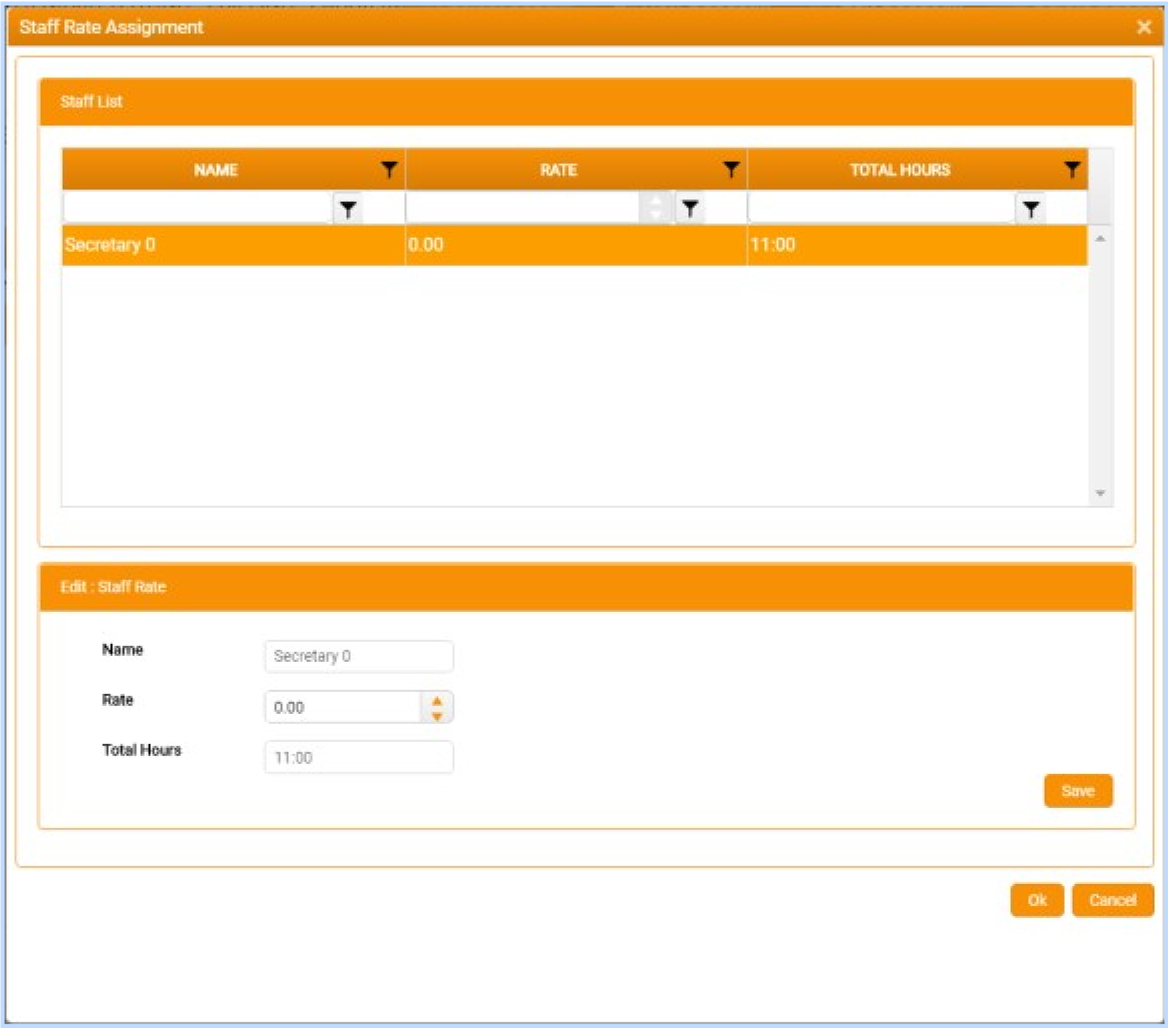


1. **Job** - Click the ellipsis button to the right to display the Job Selector and select the Job on which budget you want to base your new budget.
2. **Budget will Contain** - Select one of the following options:
   - **Actual Time** - The new budget will contain data from the previous Job's actual timesheets, not the previous Job's budget.
   - **Approved Budget** - The new budget will include data from the previous Job's budget at the time of approval.
   - **Approved Adjusted Budget** - The new budget will include the latest data from the previous Job's budget, including any post-approval adjustments.
3. Select the following checkboxes as appropriate:
   - **Group Entries by Staff Type** - If selected, all Staff are removed from the final budget and replaced with a Staff Type instance.
   - **Include Disbursements** - If selected, a disbursement budget is created.
   - **Recreate Missing Stages/Charge Accounts** - If selected, any Stage/Charge Account combinations that are found in the template but not in the source data (e.g. any deletions, or actuals outside the previous Job's budget) are recreated, added to the end of the Stage List and dated to the final day of the budget.

Staff Rate Assignment

This screen is displayed only if Staff or Staff Types associated with the budget being created have failed to return a Staff Rate for budgets.

If this screen is displayed, you must set default Staff Rates before the budget can be created.



The **Staff List** grid lists each instance of Staff and Staff Type associated with the budget being created.

Where the row represents a Staff member the **Name** column displays the Staff member's name.

Where the row represents a Staff Type instance the **Name** column displays the name of the Staff Type and a number denoting its instance: Manager 0, Manager 1, etc.

To set Staff Rates:

1. In the **Staff List**, select a Staff/Staff Type instance to activate the controls in the **Edit Staff Rate** region.
2. Enter, or use the increment control to set the Staff Rate for this Staff/Staff Type instance.
3. Click **Save**.

   The Staff Rate is applied, and this is reflected by an updated value in the **Rate** column.

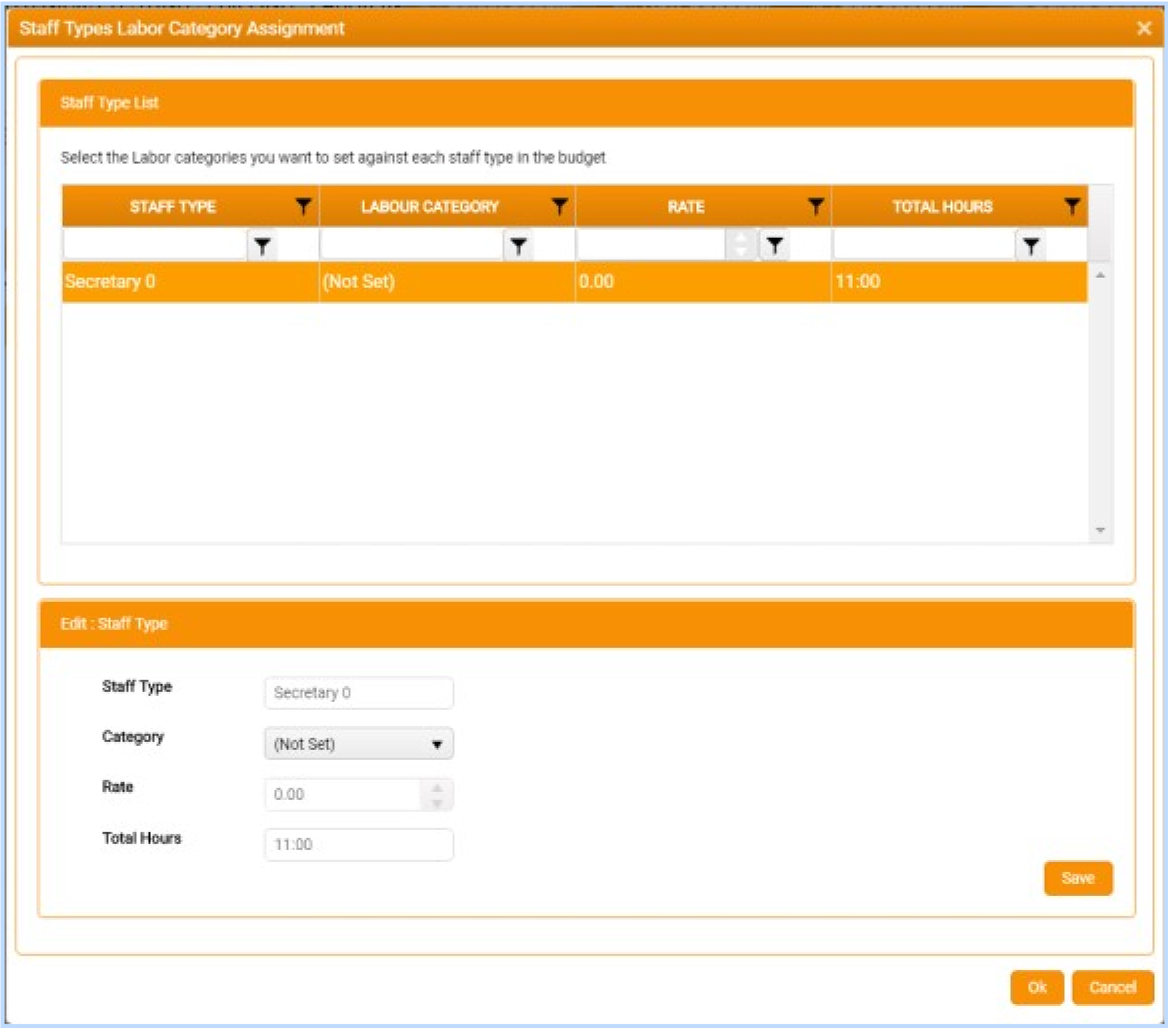
When you have assigned a Staff Rate to each Staff/Staff Type instance, click **OK** to close the Staff Rate Assignment window and complete the budget setup.

Staff Types Labor Category Assignment

This screen is displayed only if the Job is configured to use Labour Rates and there are Staff Types in the budget not assigned to any Labour Category.

Labour Rates define a Job-level charge rate on a Staff-by-Staff basis. If the final budget will include Staff Type instances with no defined Staff, each Staff Type instance must be assigned to a Labour Category for the Job, so that the associated Labour Rate can be used until a member of Staff is assigned.

Multi-currency Labour Categories are not supported.



The **Staff Type List** grid lists each of Staff Type instance in the budget.

In the **Staff Type** column, each Staff Type has a number suffix - Manager 0, Manager 1, etc. - denoting each specific instance.

To set Staff Rates:

1. In the **Staff Type List**, select a Staff Type to activate the controls in the **Edit Staff Type** region.
2. Select the appropriate Labour **Category** for that Staff Type.
3. The read-only **Rate** field displays the pre-set Rate for the selected Labour Category.
4. Click **Save**.

The Labour Category and associated Rate are applied, and this is reflected by updated values in the **Labour Category** and **Rate** columns in the Staff Type List.

When you have assigned a Labour Rate to each Staff Type, click **OK** to close the Staff Types Labour Category Assignment window and complete the budget setup.

The Staff Types Labour Category Assignment window is displayed as the last step in a budget setup only if:

a. Firm-level switch setting BudgetingUseJobRate is active (on)*,
b. Firm-level switch setting BudgetingUseCategoryRatesForTypes is active (on)*,
c. The Job has Labour Rates defined,
d. Labour Rates are used to define a Job-level charge rate on a Staff-by-Staff basis (i.e. StaffAssignOnly is inactive (off) on the Job's Labour Category definition), and
e. The final budget will include Staff Type instances with no defined Staff.

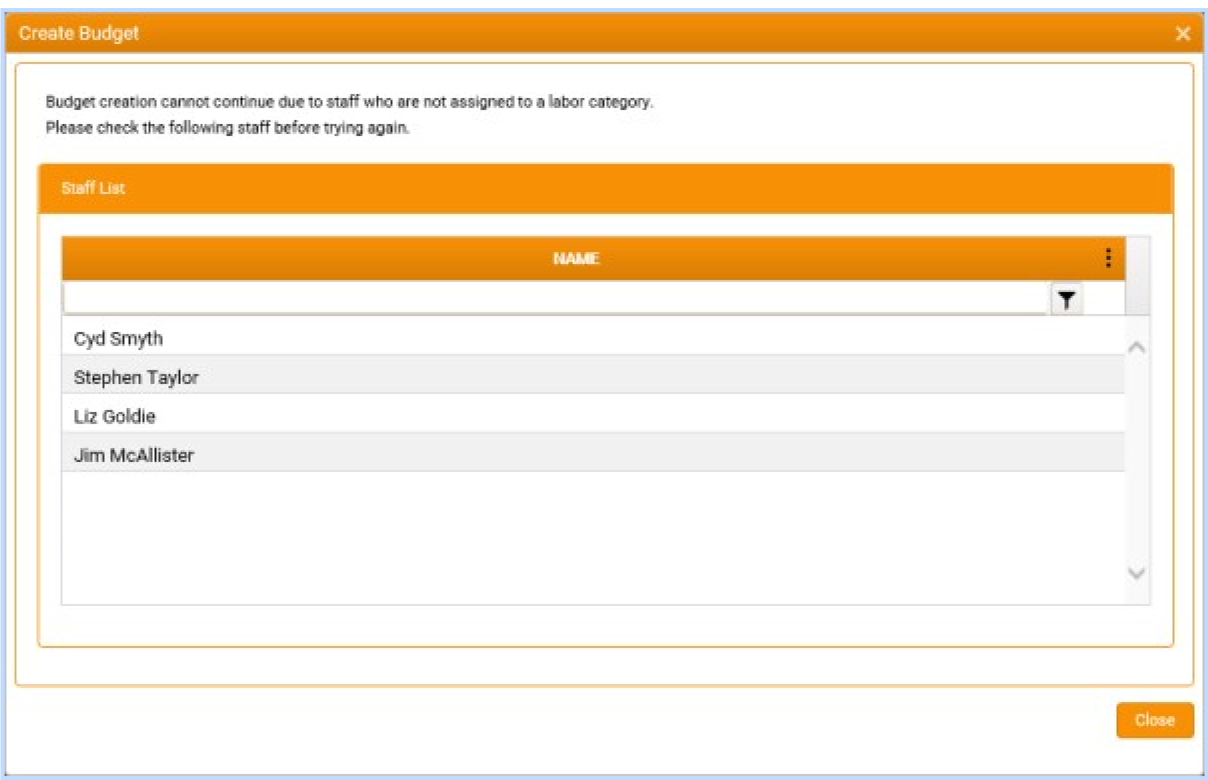
*See Setup: Firm Switches.

Budget Creation Cannot Continue

This screen is displayed only if the Job is configured to use Labour Rates and the budget's current configuration would not permit Staff to post time to the Job.

Labour Rates define a Job-level charge rate on a Staff-by-Staff basis. They also act as a Staff restriction on the Job: the application can be configured such that each Staff member must be assigned to a Labour Category for the Job so that the associated Labour Rate can be used: any Staff not added to a Labour Category cannot post time to it.

So, if there are Staff in the budget's source data that are not in the associated Job's Labour Rates, and your configuration does not permit users to post time using their normal Staff Rates, then the budget cannot be created, and you will see this screen.



Unless your system administrator changes the relevant Firm-level switch settings, in order to complete the creation of this budget you must either:

a. assign the Staff in the **Staff List** in this screen to a Labour Category, or
b. remove them from the budget.

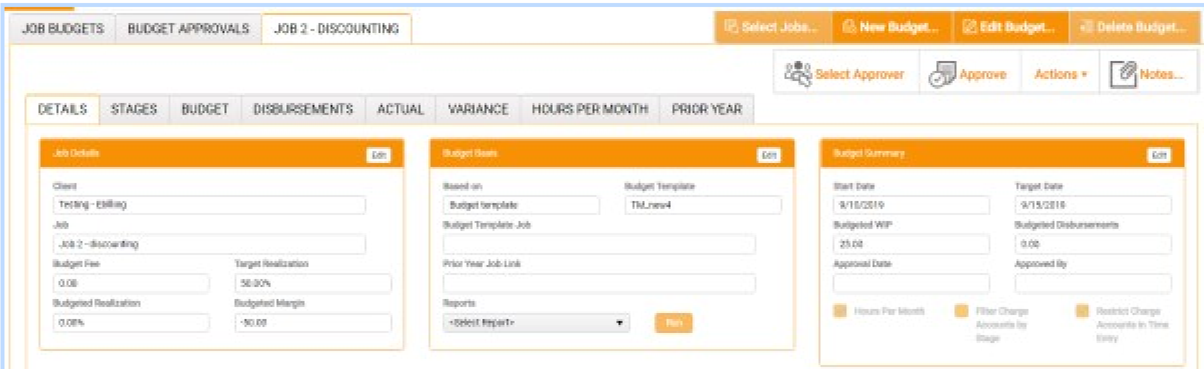
This screen is displayed only if:

a. Firm-level switch BudgetingUseJobRate (see Setup: Firm Switches) is active (on),
b. The Job has Labour Rates defined,
c. Firm-level switch ASTEEAllowPostingToJSRJobs switch is inactive (off)*, and
d. There will be Staff in the final budget that are not assigned to the Job's Labour Categories.

Editing a Budget

The **Selected Budget** tab is populated only once a Job budget is selected and opened for editing via the Job Budgets tab (see Opening a Budget). It is then re-titled with the name of the selected budget.

The tab displays an array of sub-tabs, each relating to a discrete aspect of the selected budget.



Tab Toolbar

The white toolbar within the **Selected Budget** tab presents Approval options and access to Job Notes.

Approval workflow is fully configurable, and will be specific to your organisation's implementation of StarPM: Job Budgeting. Access to approval options on the toolbar is dependent upon user privileges.

Before the budget is approved, the tab toolbar presents the following options.

- **Select Approver** / **Clear Approver**- Click to select, or de-select a Staff member who can approve the selected budget.
  - **Select Approver** displays the Staff Selector, in which you can select the appropriate Staff member to act as Approver. On selection a confirmation dialog is displayed with the message "Approver has been set."
  - **Clear Approver** de-selects the selected approver. A confirmation dialog is displayed with the message "Approver cleared."
- **Approve** - Click to approve the Budget. On approval:
  - A confirmation dialog is displayed with the message "Budget successfully approved."
  - All budget editing, for both standard budgets and Disbursements, shifts from standard budget records to Adjusted Budget records, and **Amount** labels change to **Adjusted Amount**.

Once a budget has been approved, the tab toolbar presents the following options in place of the above:

- **Unapprove** - Click to reverse the approval. On approval a confirmation dialog is displayed with the message "Budget successfully unapproved." The toolbar toggles to display the options described above.

  Reversing an approval (**Unapprove**) does not reset Adjusted Amounts.

The following options are available at all times:

- **Actions**: A drop-down list of any currently inactive options, e.g. **Clear Approver** when no approver is selected, or **Select Approver** if an approver has not yet been selected or has been cleared.
- **Notes** - Displays the Job Notes window, in which you can view or record new notes about the selected budget.

Details

Within the Selected Budget tab, the **Details** sub-tab presents high-level **Job Details** and details of the **Budget Basis**, as described below.

Job Details

The Job Details region of the **Details** sub-tab displays basic details of the Job.

Excepting only Budget Fee, the details displayed in this region are read-only. These are:

- **Client** name, **Job** name, **Budget Fee**, **Target Realization** percentage, **Budgeted Realization** amount, and **Budgeted Margin** amount.

The default calculations for the **Budgeted Margin** and **Budgeted Realization** amounts are as follows.

These calculations can be customised for your organisation, in which case the following will not apply.

If the Budgeted Fee is 0 then Budgeted Realization is not calculated.

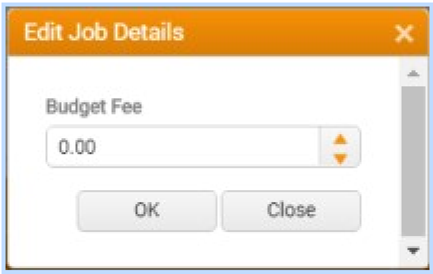
a. Budgeted Costs = Budgeted Units multiplied by the Standard Rate for all budgeted time on the Job.
b. Budgeted Margin = Budget Fee minus Budgeted Costs.
c. Budgeted Realization = (Budgeted Costs multiplied by 100) divided by the Budgeted Fee.

To edit the Budget Fee:

Dependent on user privileges.

1. Click **Edit** in the **Job Details** title bar.

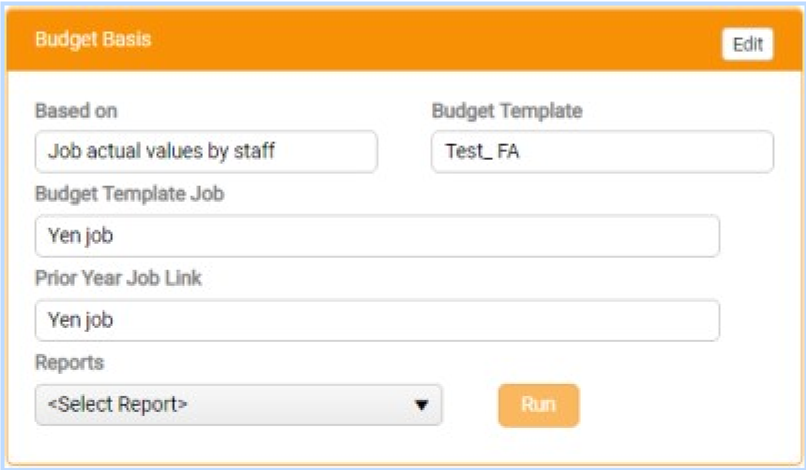
   An Edit Job Details dialog is displayed.

2. Either enter, or use the increment controls to set the **Budget Fee** for this Job.
3. Click **OK** to close the dialog and set the fee.

Budget Basis

The Budget Basis region of the **Details** sub-tab displays details of the basis for the budget, and provides reporting functionality.



With the exception of the **Prior Year Job Link**, the details displayed above the **Reports** frame in this region are read-only.

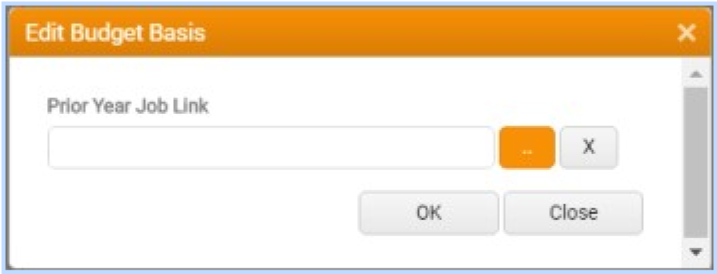
- **Based on** - The basis (budget template or previous Job) for this budget.
- **Budget Template** - The name of the Budget Template, if any.
- **Budget Template Job** - The Job related to the Budget Template.
- **Prior Year Job Link** - The prior year Job Budget used as the basis for the new budget, if any. See 'To select or edit the **Prior Year Job Link**' below.

  The **Prior Year Job Link** field may not be displayed in your organisation's implementation of StarPM: Job Budgeting. it is available only when Prior Year functionality is enabled, and it is editable only if the currently logged-in user has been granted the Job/Client Admin 2 'Edit Budget Prior Job Link' privilege, set in Star PDM to either 'Add/Edit' or 'Add/EditDelete'.

To select or edit the **Prior Year Job Link**:

1. Click **Edit** in the **Budget Basis** title bar.

   An Edit Budget Basis dialog is displayed.



2. Click the ellipsis button (**...**) to the right of the **Prior Year Job Link** field.

   The Job Selector - Budget Prior Year window is displayed.

3. In the Job Selector, locate and select the Job with the prior year budget that you want to use as the basis for the new budget.

   You are returned to the Edit Budget Basis dialog.

4. With the **Prior Year Job Link** field populated, click **OK** to close the Edit Budget Basis dialog and set the **Prior Year Job Link** in the Budget Basis region.

Reports

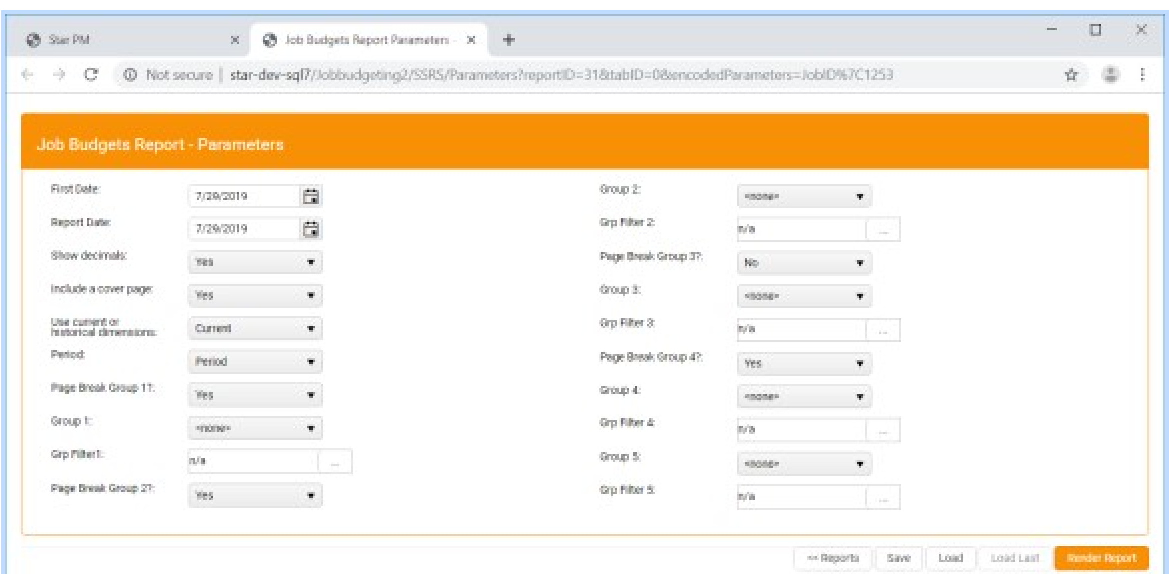
To run a report:

1. In the Budget Basis region **Reports** control, select the appropriate SSRS Report from the drop-down list

2. Click **Run**.

   The selected report is then displayed in a new tab within your Web browser.

SSRS Reporting is optional, and fully configurable. The screenshot below illustrates an example configuration of report parameters.

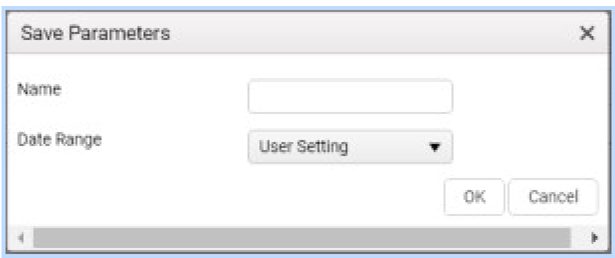


In this tab, set the parameters of your report as required, and then click **Render Report** to generate the report, which is displayed in another new Web browser tab.

- **<<Reports** - Switches focus to the **Report Selection** screen, in which an alternative report can be selected.
- **Save** - You can save the report parameters as currently configured for future reuse. Click **Save** to display the Save Parameters dialog (see below).
- **Load** - If you have any previously saved report parameters, the Load Parameters dialog is displayed (see below). If there are no saved parameters to load, a notification to that effect is displayed.
- **Load Last** - Loads the most recently selected parameters without presenting the Load Parameters dialog.
- **Render Report** - Renders the report according to the currently specified parameters, and display it in a new Web browser tab.

Save Parameters

When saving report parameters for later re-use, you are presented with the Save Parameters dialog.



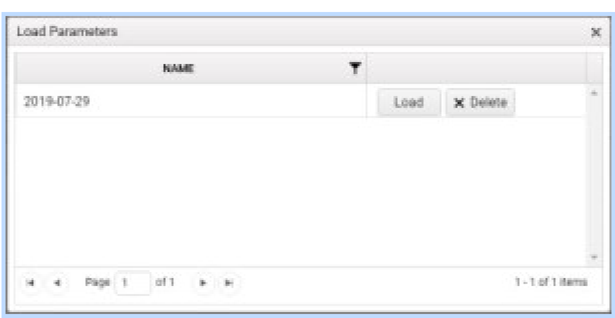
In this dialog:

1. **Name** - Enter a name for the saved parameters.
2. **Date Range** - Select one of the following options: **Current Day**, **User Setting**, **Current Month**, **Last Month**, or **Year to Last Month**.
3. Click **OK**.

   Your report parameters are saved, and can subsequently be re-applied by selection from the Load Parameters dialog.

Load Parameters

When applying previously saved report parameters, you are presented with the Load Parameters dialog.

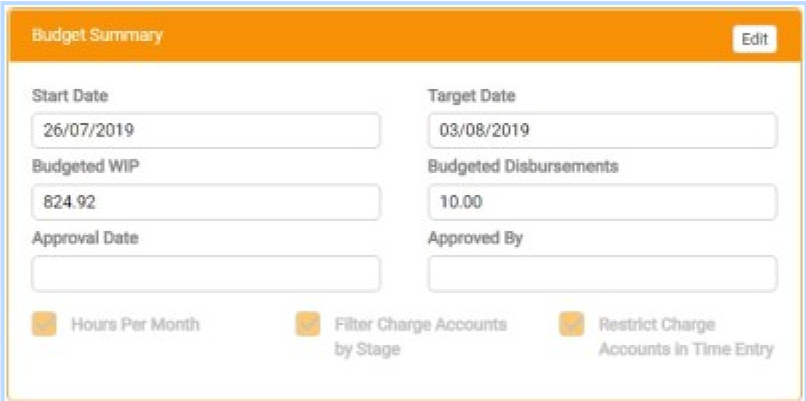


In this dialog, simply select the parameters you want to apply and click **Load**.

Here you can also delete any parameters that are no longer required: simply select the parameters you want to delete and click **Delete**.

Budget Summary

The Budget Summary region of the **Details** sub-tab displays summary details of the Job Budget.



The details displayed above the checkboxes in this region are read-only. These are:

- **Start Date**, **Target Date**, **Budgeted WIP** amount, **Budgeted Disbursements** amount, **Approval Date**, and Approver (**Approved By**).

The checkboxes have the following functions:

- **Hours Per Month** - Selection of this checkbox activates the Hours Per Month tab for editing.
- **Filter Charge Accounts by Stage** - Select to apply filtering.
- **Restrict Charge Accounts in Time Entry** - Activates the **Time Restriction** checkbox in the **Stage(s) & Charge Account(s)** controls on the Budget tab. If that checkbox is selected, then, in Star Time and Expenses, the Charge Account will be available for the Stage.

To edit the Budget Summary checkboxes:

Dependent on the current state of the approval and user privileges.

1. Click **Edit** in the **Budget Summary** title bar.

   An Edit Budget Details dialog is displayed.

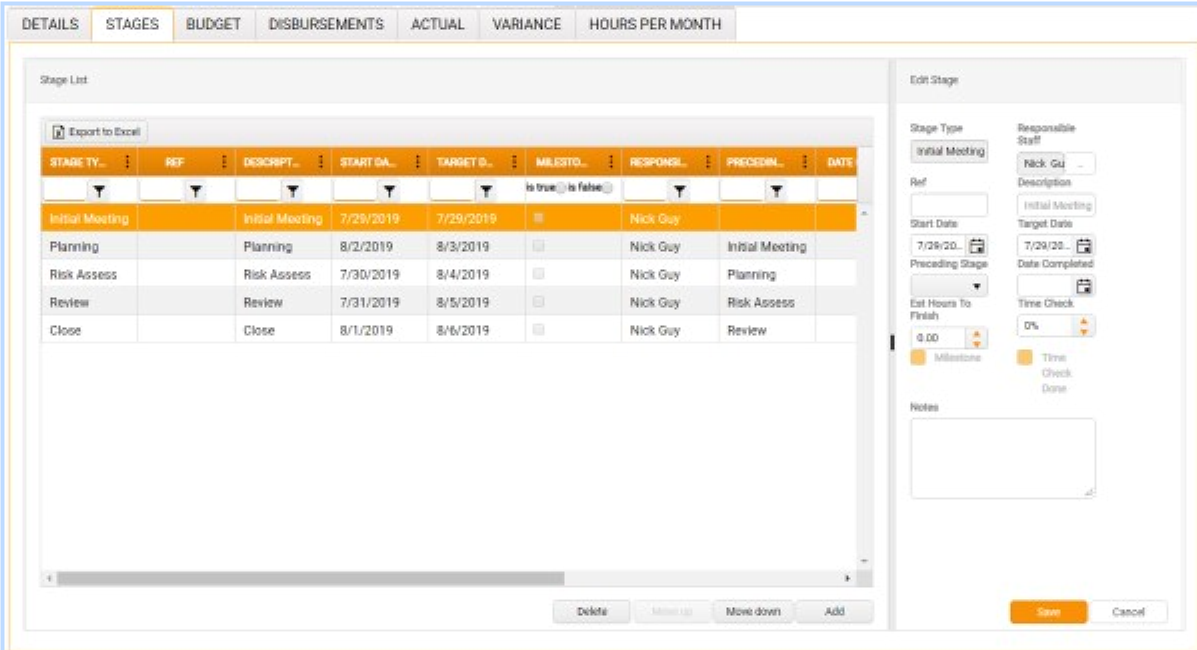
   

2. Make the appropriate checkbox de/selections.
3. Click **OK** to close the dialog and set the checkboxes.

Stages

Within the Selected Budget tab, the **Stages** sub-tab displays any Stages previously configured for the Budget.

Here you can edit, add or delete the selected budget's various Stages as required.



If you select a Stage in the **Stage List** frame on the left, the details of that Stage can then be edited in the **Edit Stage** frame on the right, as described below.

Once a budget's Stages have been defined, the association of those Stages with specific Charge Accounts can be managed on the Budget tab.

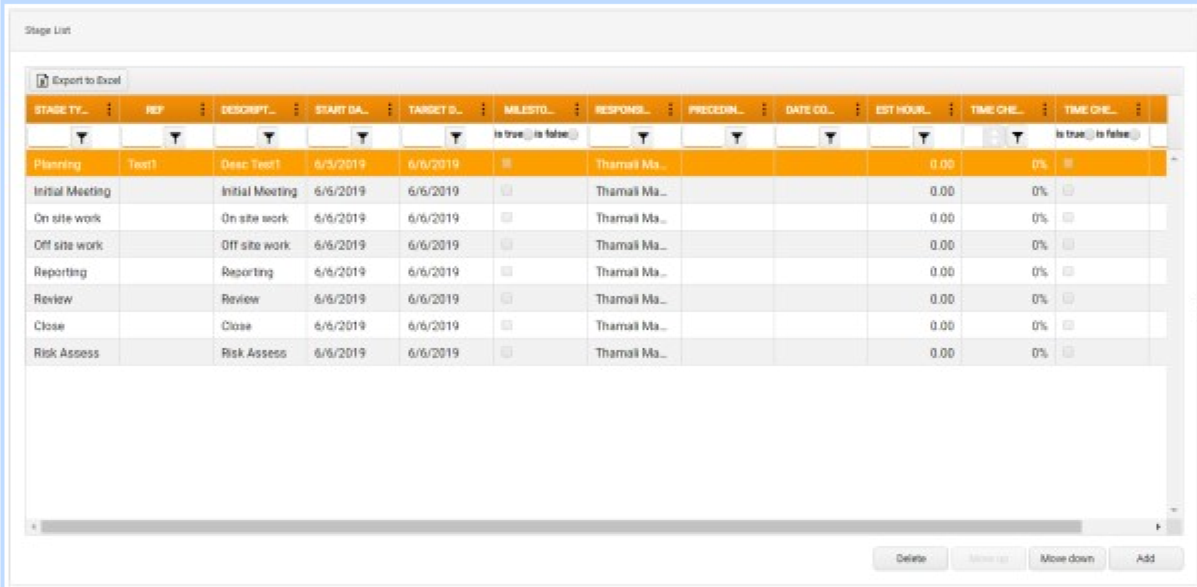
In the **Stage List** frame:

- **Delete** - Deletes the selected Stage, after a prompt for confirmation.
- **Move Up** - Moves the selected Stage up in the Stage List.
- **Move Down** - Moves the selected Stage down in the Stage List.

  The position of each Stage in the Stage List determines the default display sequence of those Stages in other screens.
- **Add** - Toggles the **Edit Stage** frame to **Create Stage**. All values are cleared or default to zero except the Start and Target Date values, which both default to the current date. When you have reset all values as appropriate for the new stage, click **Save**. The new stage is then added to the Stage List.

Stage List

The **Stage List** displays a list of the currently configured Stages related to the Selected Budget.



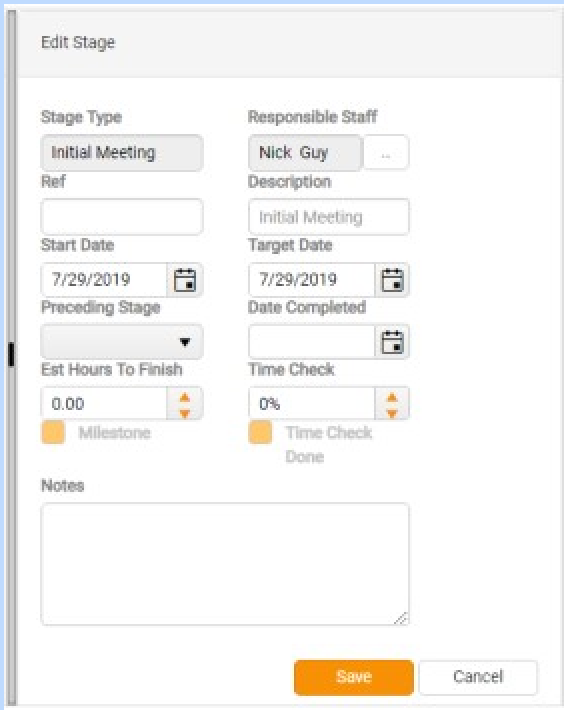
To edit a stage, select the appropriate row in the **Stage List** to populate the **Edit Stage** region to the right.

Export to Excel - Click to export the Stage List - i.e. the contents of the grid beneath the **Export to Excel** button - to your default downloads folder, creating an Excel worksheet filename 'Budget Stages'.

The filenames of all exported Excel workbooks include the relevant date/time, Client Ref and Job Ref. The date/time in the filename is the time at which the page was last loaded or refreshed, not the time at which the Excel Export button was clicked.

Edit Stage

The **Stages** tab **Edit Stage** region is populated by selecting a Stage in the **Stage List** on the left, and displays details of that Stage for editing.



In this region:

- **Stage Type** - Select a pre-defined Stage Type from the drop-down control.

  Each pre-configured Stage Type can be used only once in each budget.

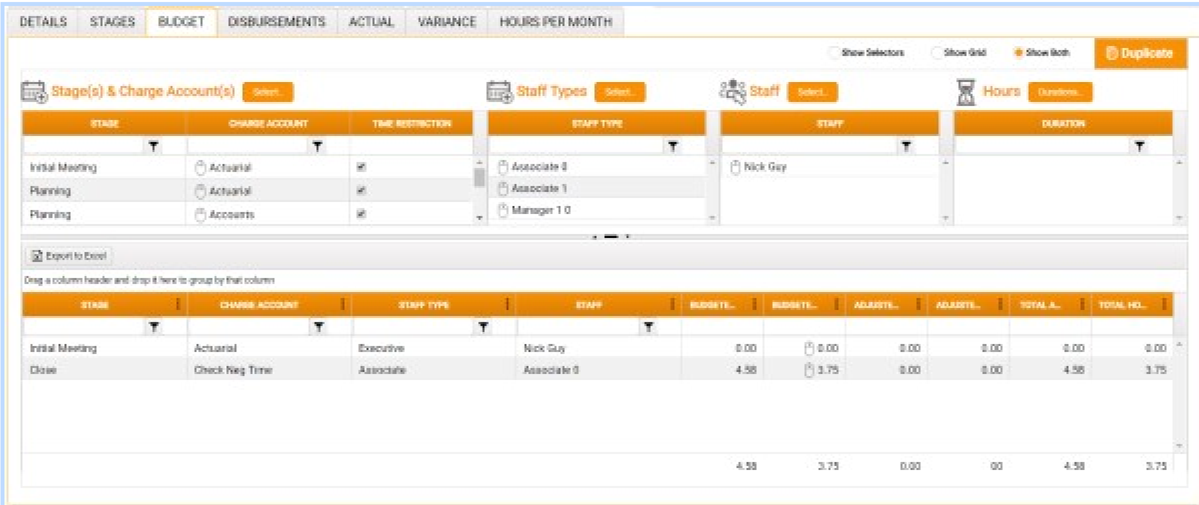
- **Responsible Staff** - Click the ellipsis button to display the Staff Selector.
- **Ref** - Optional. Enter a short identifying reference for the new Stage.
- **Description** - Read-only. Set automatically, according to the selected Stage Type.
- **Start Date** - Click the calendar control to select a start date for the Stage.
- **Target Date** - Click the calendar control to select a target end date for the Stage.
- **Preceding Stage** - Select the Stage that the new Stage will follow.
- **Date Completed** - When the Stage is completed, click the calendar control to select the date of completion.
- **Est Hours to Finish** - Optional. Enter, or use the increment control to adjust the number of hours that you estimate it will take to complete the Stage.
- **Time Check** - Enter, or use the increment control to adjust the Time Check percentage. This is used in reporting, to trigger a warning where time exceeds budgeted time.
- **Notes** - Optional. Enter any supplementary notes.

The dating of Stages in StarPM differs from the dating of Stages in Star PDM. In StarPM dating starts from the first Stage and the Start Date entered, with Stages dated sequentially (as in Job Rollover); in Star PDM, conversely, dating starts from a date one year from the current system date, with stages dated in reverse.

When you have finished editing, click either **Save** to save your changes or **Cancel** to discard them.

Budget

Each Budget Stage has a collection of Charge Accounts (tasks). In the selected Budget's **Budget** tab, you can manage the allocation of budgeted WIP to Staff working on each Charge Account at every Stage of the budget.



The grid in this tab displays all of the WIP currently allocated to Staff or Staff Types working on each Stage/Charge Account combination (zeros for a new budget).

The selectors above the grid, the display of which can be toggled on/off (see below), have the following functions:

- The **Stage(s) & Charge Account(s)** selector allows you to select the various combinations of Stage and Charge Account for the budget. See Stage(s) & Charge Account(s) below for details.
- The **Staff Types** and **Staff** selectors allow you first to select Staff Types and individual Staff members, and then to assign them to the budget.
- The **Hours** selector enables you to create custom time units for the budgeting of WIP, and to assign that time to Staff Types or Staff.

To assign Staff Types or Staff to the budget:

- Select in the **Staff Types** or **Staff** grid (see Staff Types and Staff below for details), drag them into the **Stage(s) & Charge Account(s)** grid, and drop into the **Charge Account** column on the relevant Stage/Charge Account row. A new row for the Stage/Charge Account/Staff Type or Staff combination is then added to the grid.

To assign time to Staff Types or Staff:

- Select time units in the **Duration** grid (see Hours below for details), drag them into the grid, and drop into the **Budgeted Hours** column on the relevant Stage/Charge Account/Staff Type or Staff row.

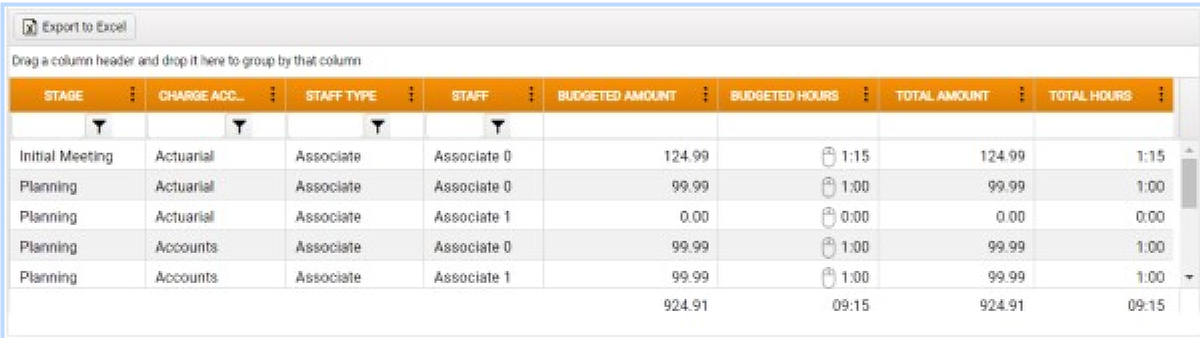
Display of the selectors and/or grid can be toggled on/off using the radio buttons at top right of the tab. Select one of the options:

- **Show Selectors**.
- **Show Grid**.
- **Show Both**.

Duplicate opens a duplicate display of the Budget tab, uncluttered by other tabs and toolbars, in a new Web Browser window. The window displaying the main module remains open, and you can navigate both views independently.

Budget Details

The grid in the Budget tab displays all of the WIP currently allocated to Staff or Staff Types working on each Stage/Charge Account combination. It will be blank for a new budget.



The Budget Details grid is populated by dragging-and-dropping either Staff Types and/or Staff onto Stage/Charge Account combinations, or vice-versa. The Budget Details grid is then updated with the addition of the appropriate rows. For details, see Stages & Charge Accounts and Staff Types and Staff below.

You can also assign time by dragging-and-dropping Durations onto Staff rows. For details, see under Budget above.

Once the grid has been populated, you can organise it by applying Column Sorting and Filtering. You can also create a custom, vertically nested view of the default grid layout by drag-and-drop Column Grouping. This might be useful, for example, in order to create a nested view of Staff Types and Budgeted Hours.

Any errors are indicated by **red text** on the row, and an error icon in the otherwise blank lead column. For information on the error, rest your cursor over an error icon to display a tooltip.

Split Bar

The horizontal 'splitter' between the selectors and the grid can be used to adjust the proportion of horizontal screen space allocated to either portion of the interface.

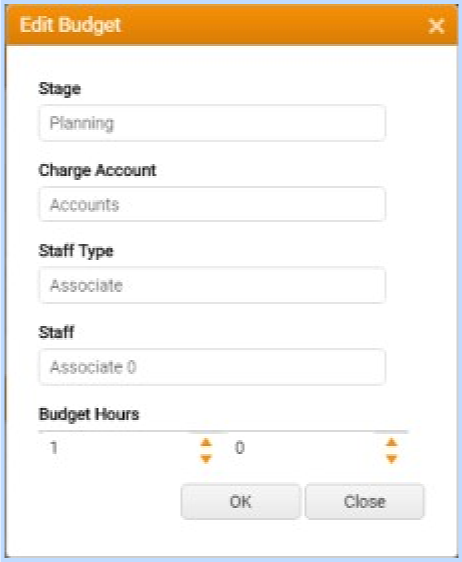
Simply select the splitter and drag vertically to the desired position.

Context Menu

With the appropriate Stage/Charge Account/Staff Type or Staff row or rows selected, right-click within the grid for the following context menu options.

Shift+Click and **Ctrl+Click** for multiple selection are supported.

- **Edit** - Displays the Edit Budget dialog, in which you can reset budget hours.



With the exception of the **Budget Hours** controls the details displayed in this dialog are read only.

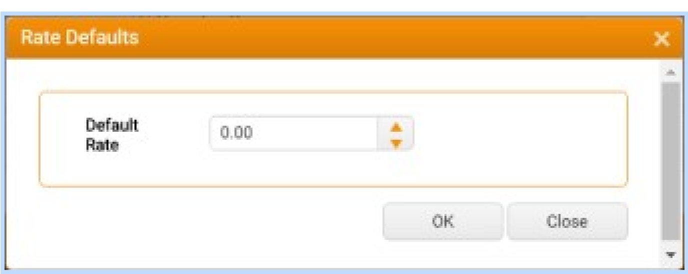
Either enter, or use the increment controls to set the **Budget Hours**(Durations).

The **Budget Hours** control will allow you to set Durations in either decimal time, hours and mins, or integer units. This is dependent on a database setting. Where Durations are specified in hours and minutes, the first increment control increments +/- 1. The second increment control increments +/- 15, except from 45 to the maximum value of 59.

- **Delete** - Displays a prompt for confirmation. If you click **Yes** in the confirmation dialog, then the selected rows are deleted from the grid.
- **Clear Hours** - Displays a prompt for confirmation. If you click **Yes** in the confirmation dialog, then all of the hours are cleared from the selected rows.
- **Edit Defaults** - Displays the Rate Defaults window.

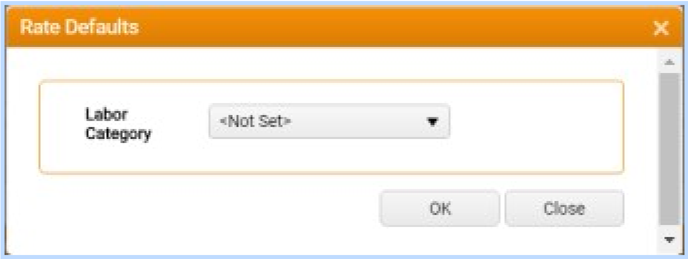
The need to set a Rate Default is indicated in the Budget Details grid by: a. the row being highlighted, and b. zero amounts resulting from the lack of a rate by which to multiply budgeted units.

When the right-click context is a Staff row, or Labour Categories are not in use on the Job, the window presents a **Default Rate** input:



The **Default Rate** is used as a fall-back if budget processing otherwse fails to obtain a rate.

When Labour Categories are in use on the Job and the right-click context is a Staff type row, the window presents a **Labour Category** control:



Select the appropriate **Labour Category**, and by extension the associated Labour Rate.

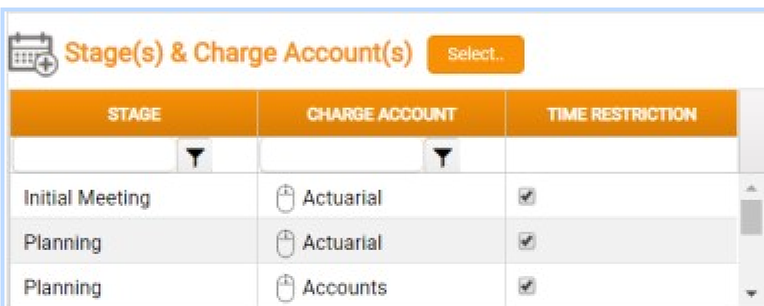
Export to Excel

Click **Export to Excel** to export the contents of the Budget Details grid to your default downloads folder, creating an Excel worksheet filename 'Budget Analysis'.

The filenames of all exported Excel workbooks include the relevant date/time, Client Ref and Job Ref. The date/time in the filename is the time at which the page was last loaded or refreshed, not the time at which the Excel Export button was clicked

Stages & Charge Accounts

The **Stage(s) & Charge Account(s)** controls on the Budget tab enable you to select multiple combinations of Stage and Charge Account for the budget. Staff can then be assigned to those Stage/Charge Account combinations, populating the Budget Details grid.



To add a Stage/Charge Account combination to the Budget, or to remove one:

- In the **Stage(s) & Charge Account(s)** region, click **Select** to display the Select Stages and Tasks window, and there make your selections or de-selections. The **Stage(s) & Charge Account(s)** grid is updated accordingly.

If you select the **Time Restriction** checkbox then, in Star Time and Expenses, the Charge Account will not be available for the Stage in the selected Stage/Charge Account combination.

Availability of the **Time Restriction** option is dependent on user privileges, and the checkbox is active only if the **Restrict Charge Accounts** checkbox is selected in the **Job Details** region of the Selected Budget Details tab.

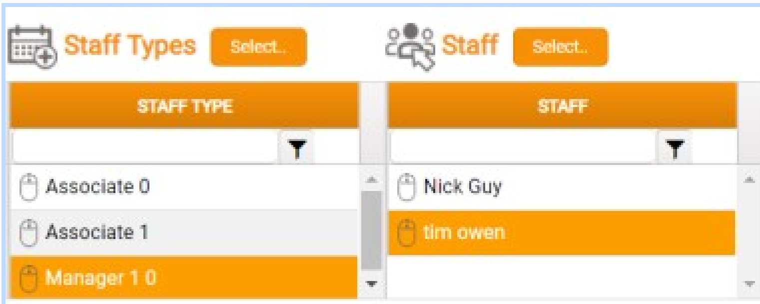
To assign Stage/Charge Account combinations to Staff:

- Select in the **Stage(s) & Charge Account(s)** grid, drag them into the **Staff Types** or **Staff** grid, and drop onto the relevant Staff Type or Staffrow.
  A new row for the Stage/Charge Account/Staff Type or Staff combination is then added to the Budget Details grid.

Shift+Click and **Ctrl+Click** for multiple selection are supported, so you can assign multiple Stage/Charge Account combinations in a single drag-and-drop action.

Staff Types and Staff

The **Staff Types** and **Staff** controls on the Budget tab enable you to manage the assignment of Staff Types and individual Staff members to the Budget.



To add a Staff Type to the Budget, or to remove one:

- In the **Staff Types** control, click **Select** to display the Select Staff Types window, and there make your selections or de-selections. The grid is then updated accordingly.

To add an individual Staff member to the Budget, or to remove one:

- In the **Staff** control, click **Select** to display the Select Staff window, and there make your selections or de-selections. The grid is then updated accordingly.

To replace Staff Types or Staff:

- In the appropriate grid, right-click the Staff Type or Staff to be replaced to display a context menu, and select either **Replace with Staff Type** or **Replace with Staff**, as required, to display the appropriate Staff Selector, and there make your new selection. The grid is then updated accordingly.

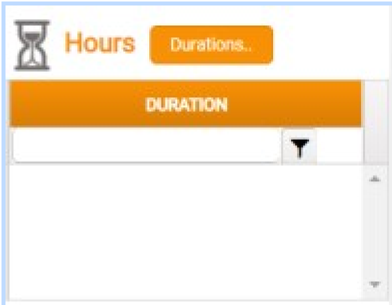
To assign Staff Types or Staff to the budget:

- Select in the **Staff Types** or **Staff** grid, drag them into the **Stage(s) & Charge Account(s)** grid, and drop into the **Charge Account** column on the relevant Stage/Charge Account row.
  A new row for the Stage/Charge Account/Staff Type or Staff combination is then added to the Budget Details grid.

Shift+Click and **Ctrl+Click** for multiple selection are supported, so you can assign multiple Staff and/or Staff Types with a single drag-and-drop action.

Hours

The **Hours** control on the Budget tab enables you to create custom time units for the budgeting of WIP, and to assign that time to Staff Types or Staff.



To create custom time units:

- In the **Hours** control, click **Durations** to display the Duration Maintenance window, and there create or delete custom time units as required. The grid is then updated accordingly.

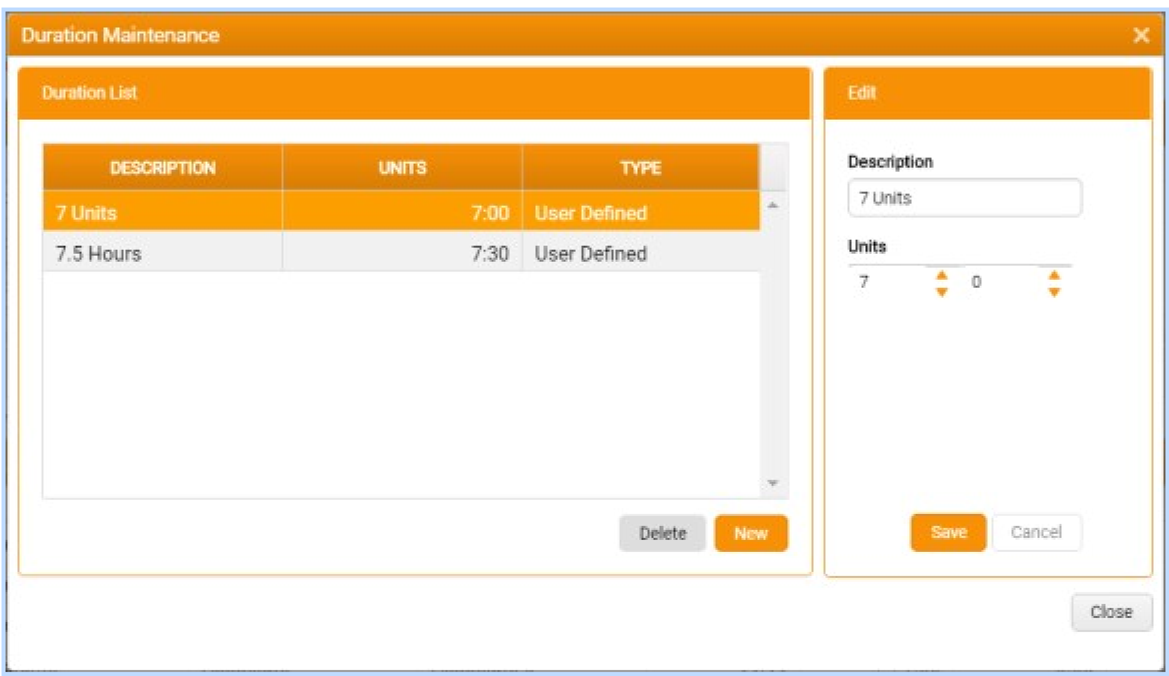
To assign time to Staff Types or Staff:

- Select time units in the **Duration** grid, drag them into the Budget Details grid, and drop into the **Budgeted Hours** column on the relevant Stage/Charge Account/Staff Type or Staff row.

Duration Maintenance

In the Duration Maintenance window you can create custom time units (Durations) for time allocation.

It is accessed by clicking Hours: **Durations** in the Selected Budget tab's Budget sub-tab.



If no Durations have been created yet the **Duration List** and **Edit** frames will both be blank.

To create a Duration:

1. Click **New**.

   The **Edit** frame is reset.

2. Enter a short, meaningful **Description** of the Duration.

3. Either enter, or use the increment controls to set the **Units** for this Duration.

   The **Units** label will change to reflect your organisation's default time format.

   The **Units** control will allow you to set Durations in either decimal time, hours and mins, or integer units. This is dependent on a database setting. Where Durations are specified in hours and minutes, the first increment control increments +/- 1. The second increment control increments +/- 15, except from 45 to the maximum value of 59.

4. Click **Save**.

   The new Duration is added to the grid in the **Duration List**.

5. Repeat steps 1 to 4 for any other Durations you want to define.

6. When you have created all the Durations you require, click **Close**.

   The Duration Maintenance window is closed. In the **Budget** sub-tab, the **Duration** grid in the **Hours** control is refreshed with the updated **Duration List**.

To delete a Duration:

1. Select the Duration in the **Duration List**.

2. Click **Delete**.

   A confirmation dialog displays the message "*Are you sure you want to delete the selected duration?*"

3. Click **Yes** to proceed with the deletion, closing the confirmation dialog.

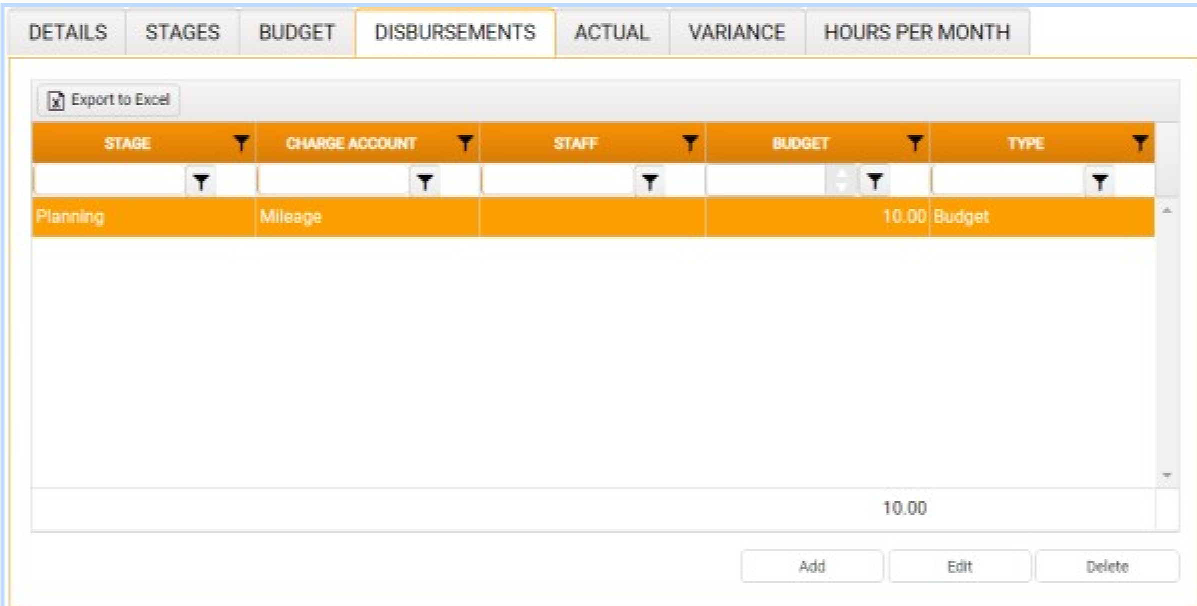
   The duration is deleted from the **Duration List**, and when the Duration Maintenance window is closed it is removed from the **Hours** control in the Budget sub-tab.

Disbursements

Within the Selected Budget tab, the **Disbursements** sub-tab enables you to create and manage Disbursement Budgets linked to individual Staff members.

If the source budget is an Approved Budget, then the new Disbursement Budget will be an Adjusted Budget.

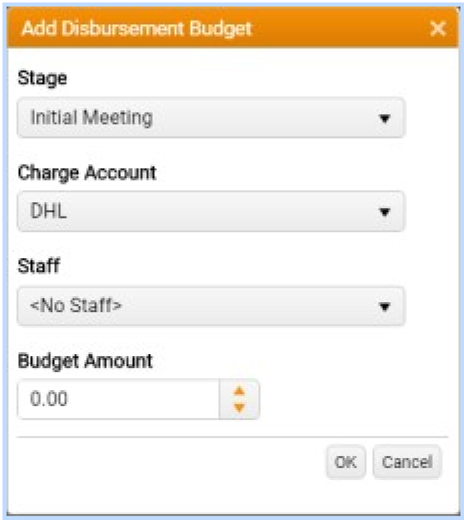
Disbursement Budgets can be added only to Stages where Staff are budgeted for. Disbursements cannot be linked to Staff Types.



To create a Disbursement Budget:

1. Click **Add**.

   The Add Disbursement Budget window is displayed.

2. Select the appropriate budget **Stage**, **Charge Account** and **Staff**.
3. Enter, or use the increment control to adjust, the **Budget Amount**.
4. Click **OK**.

   The new Disbursement Budget is added to the grid in the **Disbursements** sub-tab.

To edit a Disbursement Budget:

1. Select the Disbursement Budget in the grid.
2. Click **Edit**.

   The Edit Disbursement Budget window is displayed.

   Except for the title and the pre-populated values, this is identical to the Add Disbursement Budget window.

3. Edit the Disbursement Budget as required.
4. Click **OK**.

   The row representing the Disbursement Budget is updated.

To delete a Disbursement Budget:

1. Select the Disbursement Budget in the grid.
2. Click **Delete**.

   You are prompted for confirmation: "*Are you sure?*"

3. Click **OK** to confirm the deletion.

   The row representing the Disbursement Budget is deleted from the grid.

To export the contents of the grid to your default downloads folder:

- Click **Export to Excel**.

  This creates an Excel worksheet, filename 'Budget Disbursements'.

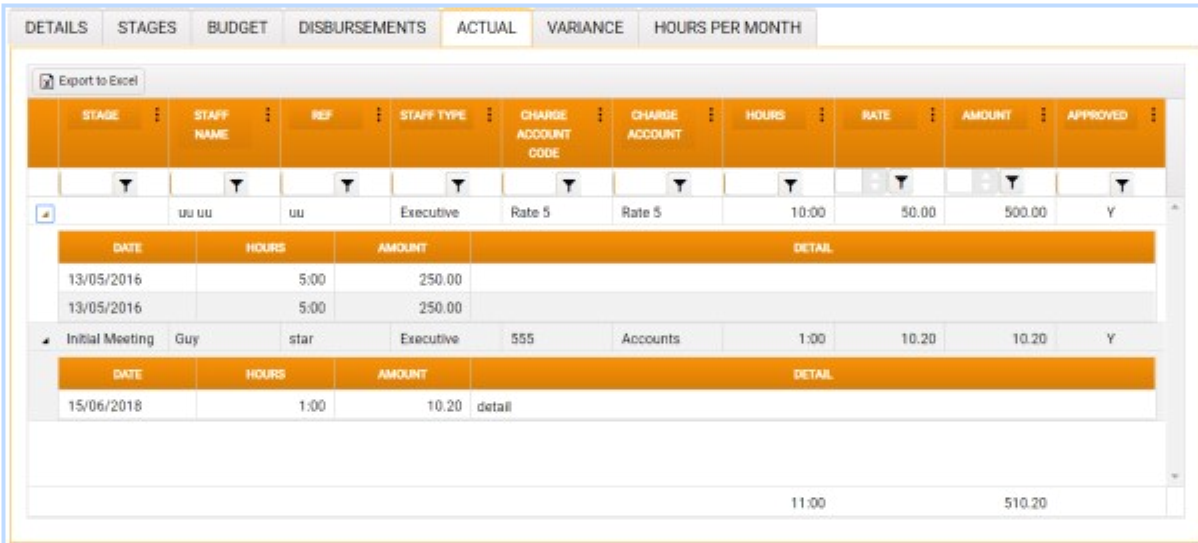
  The filenames of all exported Excel workbooks include the relevant date/time, Client Ref and Job Ref. The date/time in the filename is the time at which the page was last loaded or refreshed, not the time at which the Excel Export button was clicked.

Actual and Variance

Within the Selected Budget tab, the **Actual** and **Variance** sub-tabs both provide reporting functionality.

The **Actual** tab provides drill-down to individual WIP Records

The information in both tabs is read-only. Hours columns display Durations in either decimal time, hours and mins, or decimal units, dependent on a database setting.



In the **Actual** tab only, the grid expands to display the individual amounts that comprise the total in the parent row.

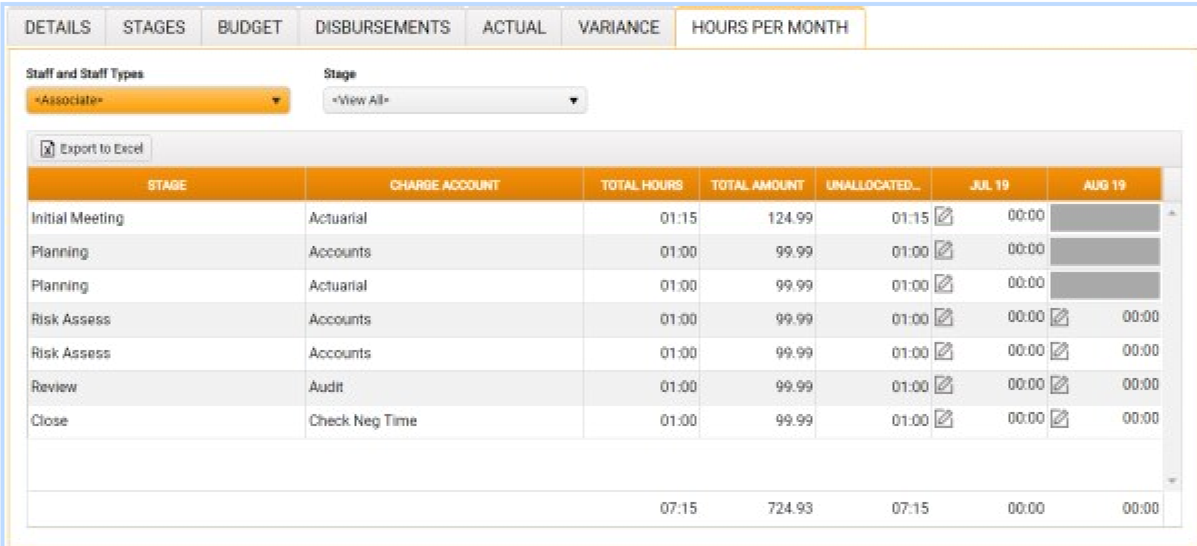
Export to Excel - Click to export the contents of the grid to your default downloads folder, creating an Excel worksheet, filename 'Budget Actual' if exporting from the Actual tab or 'Budget Variance' if exporting from the Variance tab.

The filenames of all exported Excel workbooks include the relevant date/time, Client Ref and Job Ref. The date/time in the filename is the time at which the page was last loaded or refreshed, not the time at which the Excel Export button was clicked.

Hours Per Month

The Selected Budget **Hours Per Month** tab allows you to manage the allocation of Hours to specific Staff Types or individual Staff members over months.

This tab must be activated by selection of the **Hours Per Month** checkbox in the Selected Budget tab (**Details** sub-tab, **Job Details** region).



Each of the date columns on the right of the Hours Per Month grid represents a single calendar month, and there are various ways in which you can edit the hours allocated to each Staff Type or Staff in each month.

To populate the grid:

- Select a Staff Type or individual Staff member from the **Staff and Staff Types** drop-down.

To filter the grid:

- Select either a specific Budget Stage or View All from the **Stage** drop-down.

  Filtering the display by Stage selection both filters the rows displayed in the grid and restricts the month columns displayed to those in the selected Stage's date range. If, for example, all of the Stages of a given budget span January to December, with Stage *n* spanning April to June, then the unfiltered grid displays all columns for January to December but, for Stage *n*, only the columns for April to June are editable. With Stage *n* selected in the **Stage** filter, only the editable columns for April to June are displayed.

To export the contents of the grid to your default downloads folder, creating an Excel worksheet, filename 'Budget Hours Per Month':

- Click **Export to Excel**.

With the appropriate Staff Type or Staff row or rows selected, right-click within the grid for the following context menu options:

- **Add Hours Per Month** - Replaces any existing hours with the default Hours per month, and proportions the total budget for the Stage/Charge Account/Staff and Staff Type combination equally between all applicable columns.

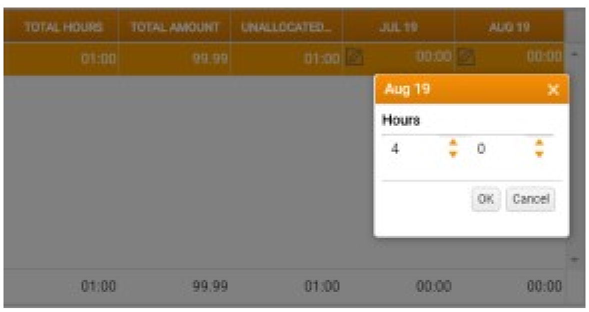
  Where an individual proportion is greater than two decimal places rounding is applied, with the remainder of downward rounded amounts being carried forward to later periods, included at the point where they tip the amount into an upward rounding. For example, if a Total Budget is 100 and a Stage spans three months, then the unrounded proportion is 33.3 recurring.
- **Delete Hours Per Month** - Clears any existing hours from the selected row.
- **Adjust Budget Hours** - Amends the budget to match the Total Hours for the selected row.

  Each of the above first prompts for confirmation.

  If the budget is Approved, any adjustments are made to the Approved Adjusted Budget.

To edit the hours assigned on a particular date:

1. Click the Edit icon  in the date cell to display the Hours dialog:

2. Either enter, or use the increment controls to set the **Hours** (Durations) for this date.

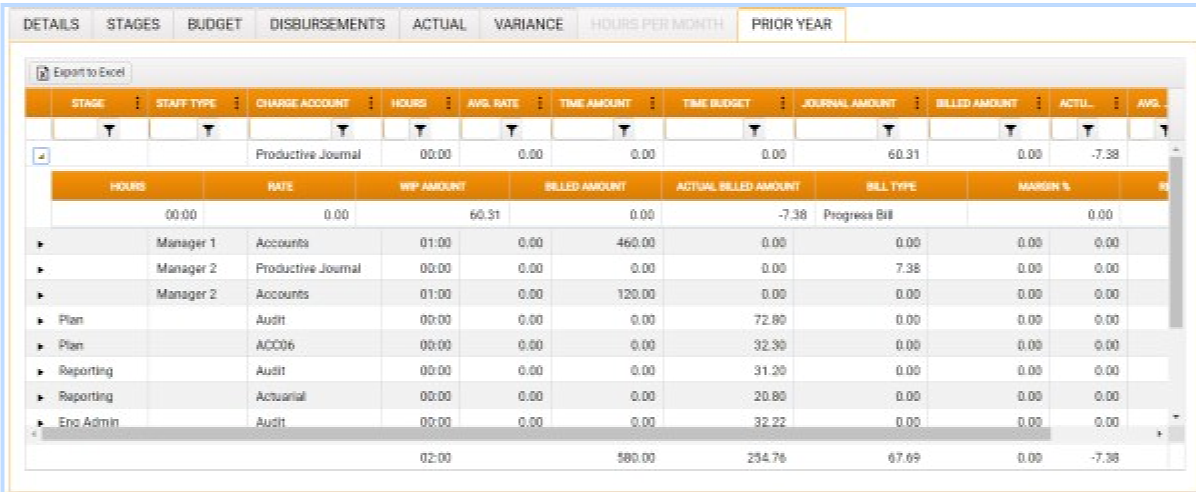
   The **Hours** control will allow you to set Durations in either decimal time, hours and mins, or units. This is dependent on a database setting. Where Durations are specified in hours and minutes, the first increment control increments +/- 1. The second increment control increments +/- 15, except from 45 to the maximum value of 59.

3. Click **OK** to close the dialog and update the hours in the grid.

Prior Year

Prior Year functionality allows the selection of a prior year Job to use as the Budget Basis. The Selected Budget **Prior Year** sub-tab will then display the prior year Job's WIP, billing, and budget details, and provides reporting functionality.

The **Prior Year** tab may not be available in your organisation's implementation of StarPM: Job Budgeting. This is determined by Firm-level switch setting JobBudgetEnablePriorYear, maintained in Star PDM: (see Setup: Firm Switches).



By default, Prior Year data is as recorded when the Prior Year Job was selected: however, a stored procedure can be employed by your organisation to update to update this information daily overnight.

The display of Prior Year data is fully customisable. Stored procedures can be used to customise any or all of the following aspects of the interface to meet your organisation's acquirements:

- The columns/data displayed in the main grid.
- The columns/data displayed in the expanded grid.
- Column headers (customised headers are not subject to Replace Terms).

For details, see Setup: User-defined Stored Procedures.

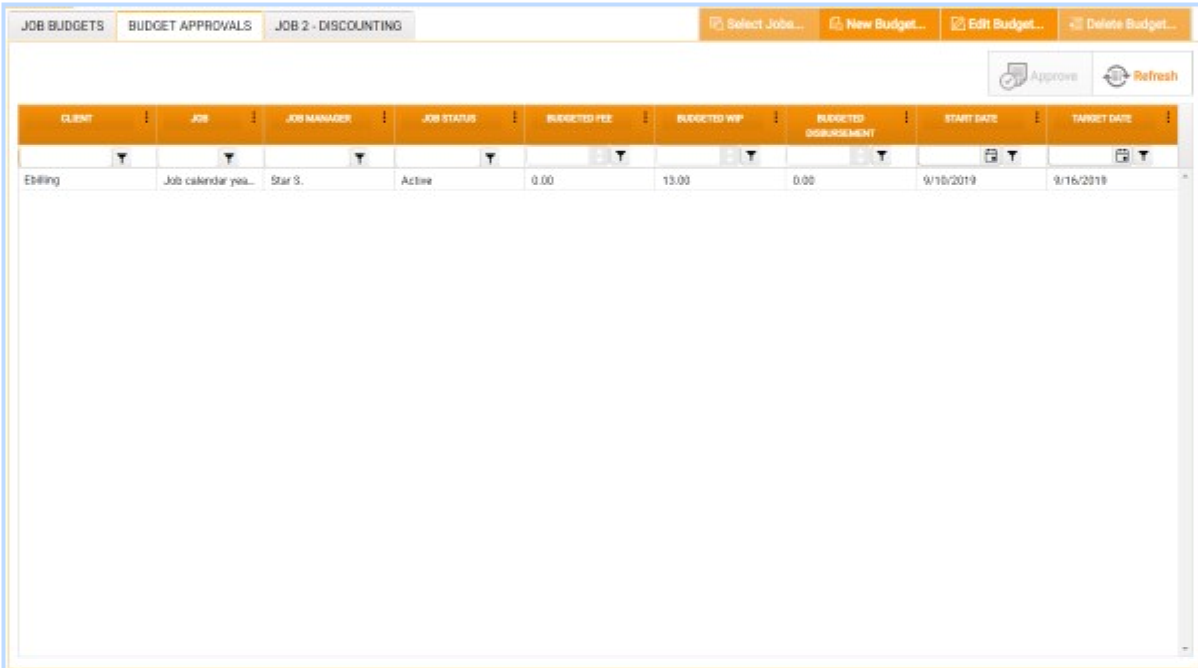
Export to Excel - Click to export the contents of the grid to your default downloads folder, creating an Excel worksheet, filename 'Budget Prior Year'.

The filenames of all exported Excel workbooks include the relevant date/time, Client Ref and Job Ref. The date/time in the filename is the time at which the page was last loaded or refreshed, not the time at which the Excel Export button was clicked

Budget Approvals

This tab displays any Job Budgets for which the current user has been selected as Approver.

Here, approvers can quickly review any budgets awaiting their approval, and approve them.



The Budget Approvals tab is displayed only if the currently logged-in user has been granted the Job/Client Admin 'Job Plans' privilege, set in Star PDM to either 'Approve', 'Edit or Approve', or 'Edit and Approve'.

If the currently logged-in user has been granted the 'Job Plans' privilege set to 'Edit or Approve' and was the last user to edit a Job Budget, then that Job Budget will not be listed, as 'Edit or Approve' does not permit users to approve their own edits.

Tab Toolbar

The white toolbar within the **Budget Approvals** tab presents the following options:

- **Approve** - Click to approve one or more selected Job Budgets. See Approving a Budget below.

  The **Approve** button is inactive until a Job Budget is selected, and will remain inactive if any selected Job Budget is not in a suitable state to be approved, for example because someone else has already approved it since the grid was last refreshed.

- **Refresh** - Click to refresh the Budget Approvals Grid.

  The grid is refreshed automatically whenever the current user edits a Job Budget using the **Edit Budget** menu option, in any browser window, but it is not refreshed automatically if any other user makes any changes.

Approving a Budget

To approve one or more budgets:

1. Select, in the Budget Approvals grid, the budget or budgets that you want to approve.

   Shift+Click and **Ctrl+Click** for multiple selection are supported.

2. Click **Approve** in the toolbar.

   An Approve dialog is displayed, prompting you to confirm the approval.

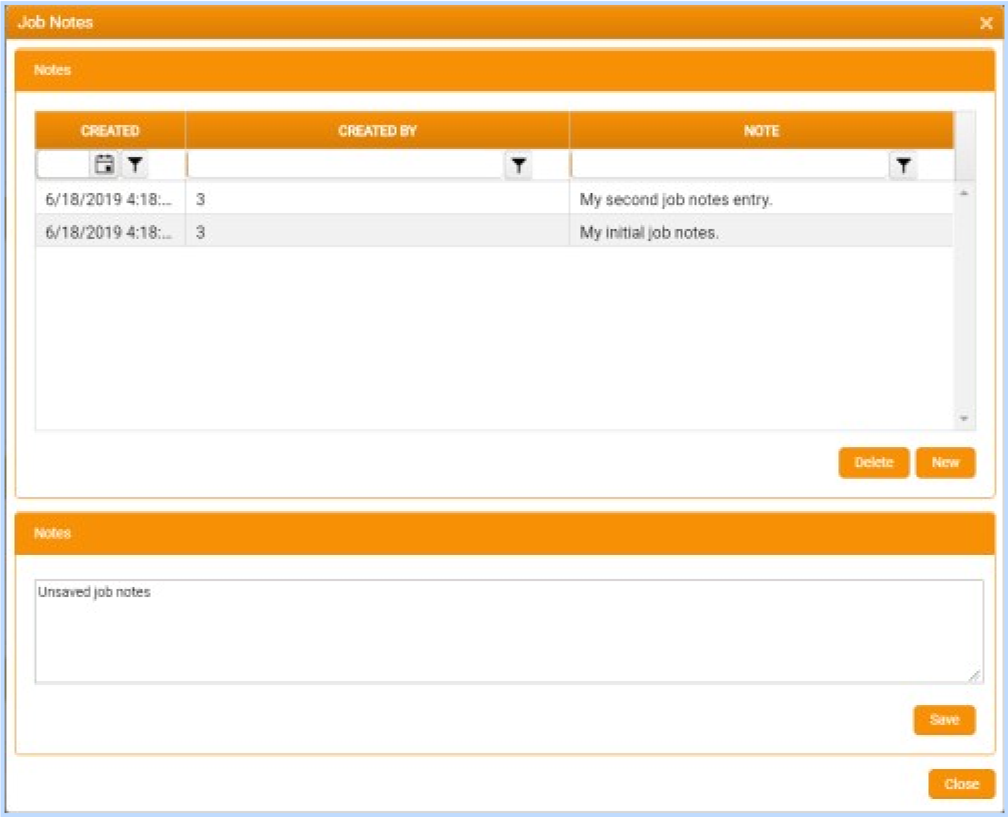
3. Click **Yes** to confirm your approval.

   Any approved Job Budgets are removed from the grid.

   Approval workflow typically involves validation checks before completing approval: for instance, the Job Budget must contain budgeted time. If any Job Budget fails validation, then none of those selected for approval will be approved.

Job Notes

Accessed from the **Selected Budget** tab toolbar, the **Job Notes** window displays any notes previously recorded against the selected Job - not the budget specifically) - and allows you to record your own Job Notes.



In this window:

1. Click **New** in the main **Notes** grid to activate the lower, free text **Notes** field.
2. In the **Notes** field, enter any notes you want to record.
3. Click **Save**.

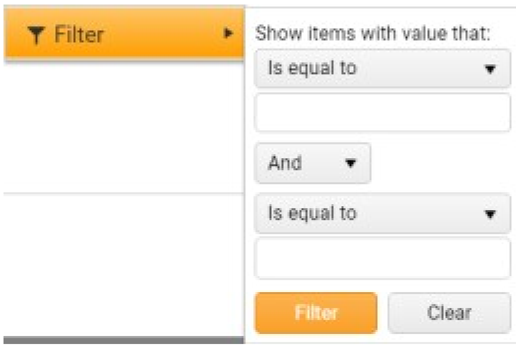
   Your new notes are inserted as a new row in the main **Notes** grid.

The contents of the **Notes** field is not cleared until either you click **New** again, or you click **Close** to close the window.

Column Sorting, Filtering and Grouping

Left-click to the right in any column header to access the following context menu options:

- **Sort Ascending** - Applies an ascending alphanumeric sort order to the column.
- **Sort Descending** - Applies an descending alphanumeric sort order to the column
- **Columns** - Displays a list of all columns available for display. Select only those that you want to view.
- **Filter** - Displays a filter control, enabling you to filter the column to display only those search results that match one or two specified conditions:



To apply a column filter:

1. In the upper selection control, select the first condition (**Is equal to**, **Starts with**, **Contains**, etc.).
2. In the first field, enter the value for the first condition.
3. If you are specifying two conditions, in the second selection control, select the appropriate operator (**And**, **Or**).
4. In the third selection control, select the second condition.
5. In the second field, enter the value for the second condition.
6. Click **Filter**.

Column Grouping

In certain grids - as in the Selected Budget, **Budget** tab Budget Details grid - you can create a hierarchical, vertically nested view of the default grid layout.

To apply column grouping:

1. Drag-and-drop the column representing the principle category into the area labelled "Drag a column header and drop it here to group by that column."

   The labelling text is replaced by the column.

2. Drag-and-drop the column representing the secondary category to the right of the parent column.

   You can drop to the left, but this will affect the hierarchical order.

3. Repeat step 2 for any further child columns/categories.

Selectors

The selectors described below each serve a specific database search function. Each is accessed at the appropriate point in the budget workflow.

The Job Selector and Job List Selector

There are multiple Job Selectors in this module:

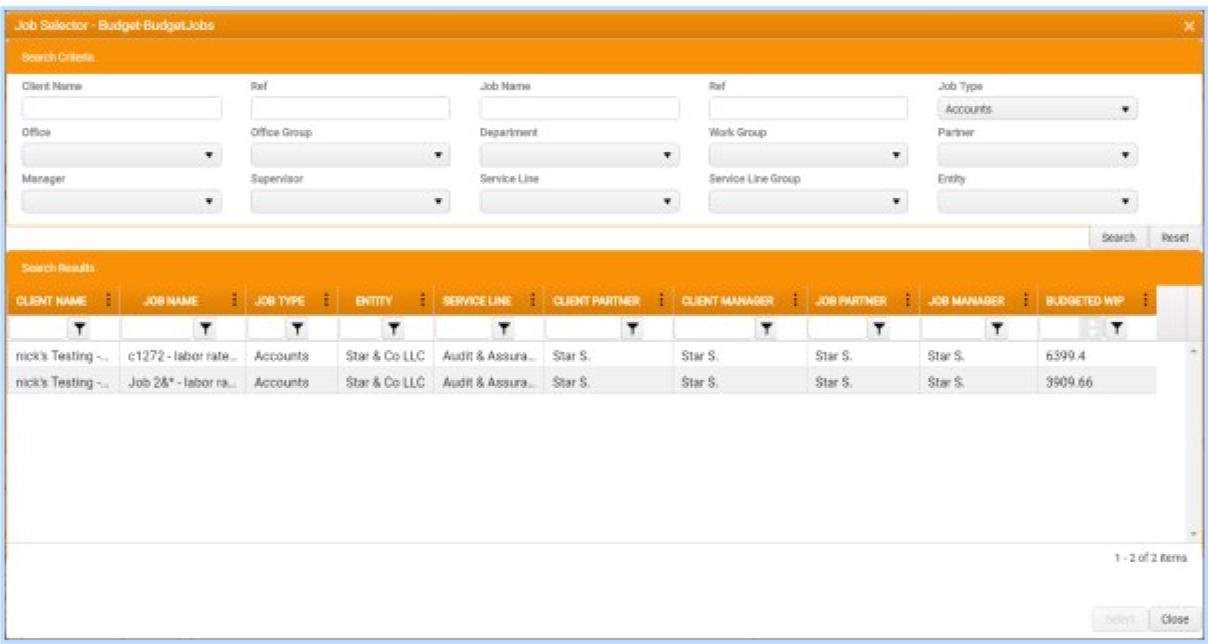
- The **Job Selector** is displayed as the first step in the creation of a new budget. It allows you to select the specific Job for which you want to create a budget. It is accessed by clicking **New Budget** in the main toolbar.

  The Job Selector returns only those Jobs currently without a budget or mini-budget.

- The **Job List Selector** allows you to populate the Job Budgets tab by locating and selecting one or more Job Budgets to work on. It is accessed by clicking **Select Jobs** in the main toolbar.
- The **Job Selector - Budget Prior Year** allows you to select the Job with the prior year budget that you want to use as the basis for a new budget. It is accessed either when creating a Prior Year Job Link during Budget Setup, or by clicking **Edit** in the Budget Basis region of the Selected Budget **Details** sub-tab.

  When Entity-level Functional Currency functionality is enabled, The Job Selector - Budget Prior Year searches only for Jobs with the same Entity currency as either the Target Job's Entity currency (when creating a Budget), or the current Job Budget (when editing a Budget Basis).

The various Job selectors are identical, except that the Job List Selector allows you to select multiple Jobs, displaying a preview of those selections in an additional frame to the right (illustrated below).



To enter a Job search:

1. Enter any appropriate **Search Criteria** that would help to narrow the search.
2. Click **Search**.

   Any matching Job records that match the Search Criteria you entered are displayed in the **Search Results**.

   Entity and service line filtering is applied by default. In your organisation's implementation, stored procedures might be used to apply additional levels of filtering. In the Budget Prior Year selector, for example, restrictions may specify that the Prior Year Job must be of the same Type as the current budget's Job.

   You can organize the **Search Results** by applying Column Sorting and Filtering.

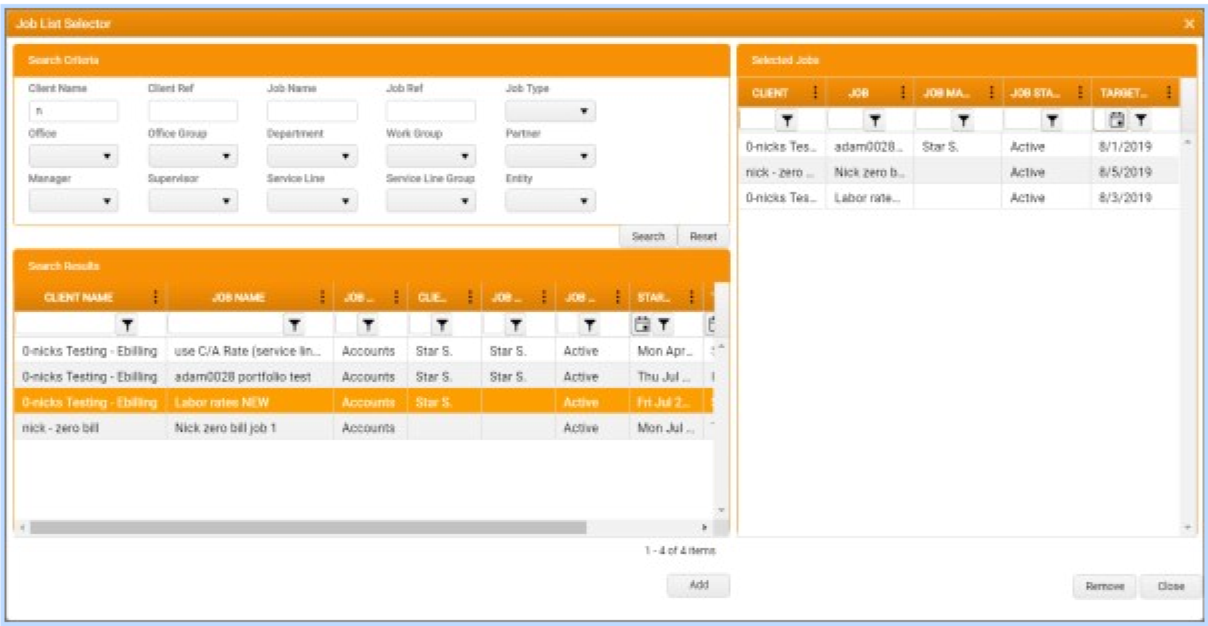
You can also clear individual Search Criteria, enter additional Search Criteria and click **Search** again, or click **Reset** to clear all Search Criteria and begin again.

3. Select the Job from the **Search Results**.
4. In the Job Selector, click **Select**. The Job Selector is closed and the Budget Setup window is displayed automatically as the next step in the budget creation.

   In the Job List Selector, click **Add**. The selected Job is added to the **Selected Jobs** grid on the right (see below for details). You can then search for and add further Jobs, as required, before closing the Job List Selector and populating the Job Budgets tab with details of the Selected Jobs.

Selected Jobs (in Job List Selector)

In the Job List Selector only, the **Selected Jobs** grid on the right (the Job List) displays a preview of any Jobs selected from the **Search Results**. You can then search for and add further Jobs, as required.



To remove a Job from the **Selected Jobs** list, simply select it and click **Remove**. There is no prompt for confirmation.

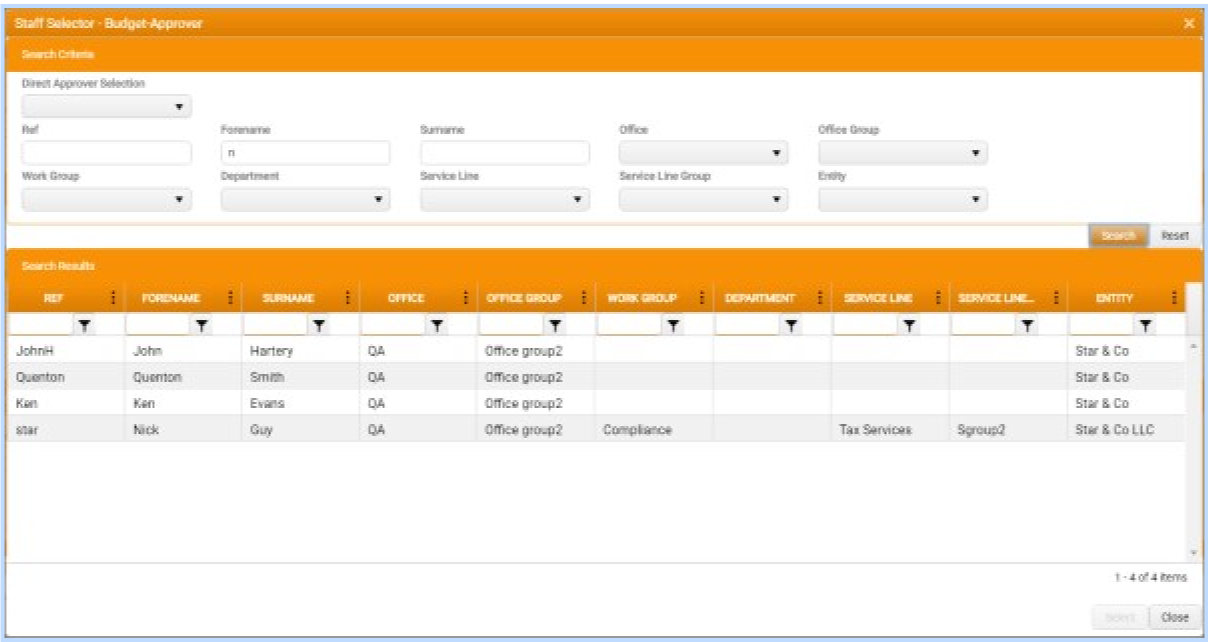
When you have selected all of the relevant Jobs, click **Close**. The Job List Selector is closed, and the Job Budgets tab is populated with details of the Selected Jobs.

Staff Selectors

The Staff Selector enables you to select either an appropriate Staff member to approve the budget, or the Responsible Staff member for a specific budget Stage.

It is accessed either by clicking either the **Responsible Staff** ellipsis button in the **Edit Phase** section of the Selected Budget tab's Stages sub-tab or the **Select Approver** option in the Selected Budget tab toolbar, or by selecting a **Replace** context menu option in the Selected Budget tab's Budget sub-tab, **Staff Types** or **Staff** grids.

The windows are identical, except with regard to **Search Criteria**, which is specific to context. The following screenshot illustrates the Staff Selector for Budget Approver.



To enter a search:

1. Enter any appropriate **Search Criteria** that would help to narrow the search.
2. Click **Search**.

   Any matching Job records that match the Search Criteria you entered are displayed in the **Search Results**.

   If you need to narrow your search, enter additional Search Criteria and click **Search** again.

   You can also clear individual Search Criteria, or click **Reset** to clear them all and begin again.
3. In the **Search Results**, apply any sort options or filters that will help to refine your selection. See below for details.
4. Select the Approver or Responsible Staff member from the **Search Results**.
5. Click **Select**.

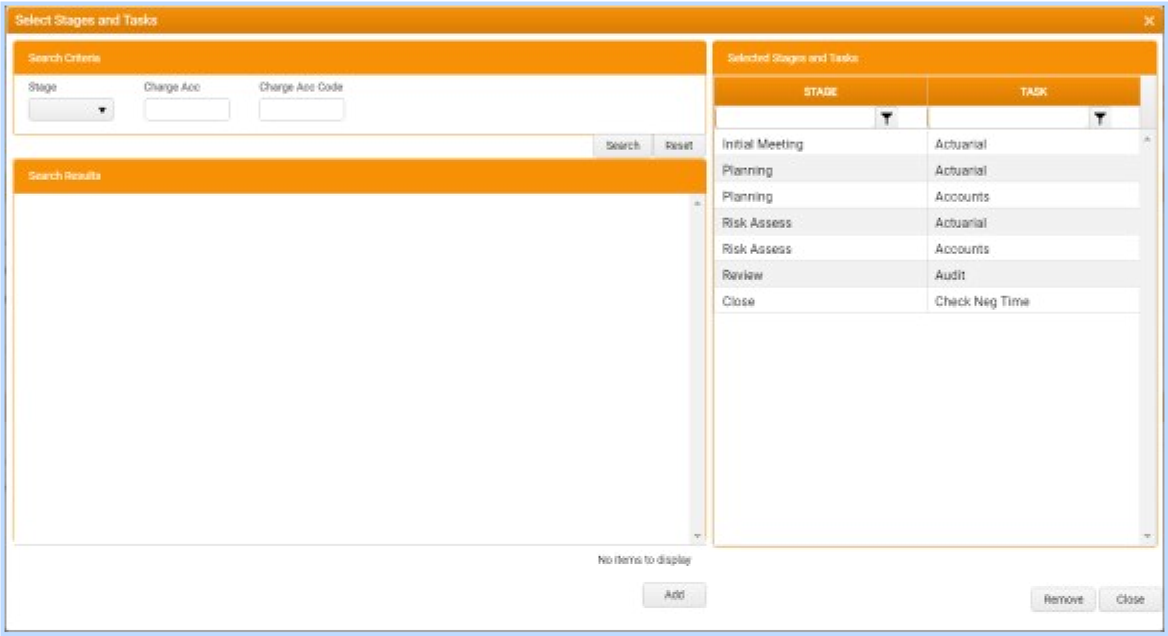
   The selected Staff member is either added to the list of Approvers, or populates the **Responsible Staff** field, as appropriate. When choosing Responsible Staff, click **Save** to save the change.

   You can click **Close** at any time to close the Selector window making a Staff selection.

Select Stages & Tasks

In this window you can add or remove Stage/Task combinations for the budget.

It is accessed by clicking **Select** in the **Stage(s) & Charge Account(s)** region in the Selected Budget tab.



To select Stage/Charge Account combinations for the Budget:

1. In the **Search Criteria** region, either select the appropriate budget Stage from the **Stage** drop-down, or enter a whole or partial Charge Account name or code into the **Charge Acc** and/or **Charge Acc Code** fields, and then click **Search**.

   Any matching Stage/Charge Account combinations are listed in the **Search Results** region.

   Use the column filters to refine your Search Results, or, to clear them and start again, click **Reset**.

2. In the **Search Criteria** region, select the appropriate Stage/Charge Account combinations, and then click **Add**.

   Shift+Click and **Ctrl+Click** for multiple selection are supported.

   The selected Stage/Charge Account combinations are added to the **Selected Stages and Tasks** list on the right.

3. When each of the required Stage/Charge Account combinations are listed in the **Selected Stages and Tasks** region, click **Close**.

   The Select Stages and Tasks window is closed, the selected Stage/Charge Account combinations are added to the budget, and the **Stage(s) & Charge Account(s)** region in the Selected Budget tab is updated accordingly.

To remove a Stage/Charge Account combination from the Budget:

1. In the **Selected Stages and Tasks** region, select the Stage/Charge Account combinations that you want to remove.

2. Click **Remove**.

   The selected Stage/Charge Account combinations are removed from the **Selected Stages and Tasks** list, and will be removed from the budget when you click **Close** to close the Select Stages and Tasks window.

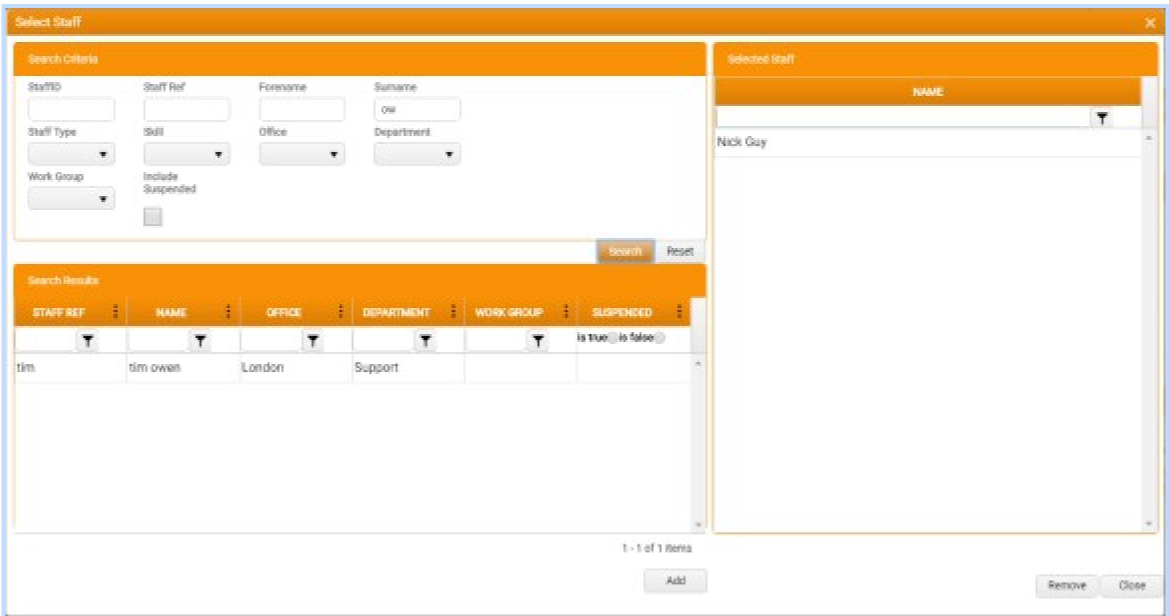
Select Staff Types or Staff Members

The Select Staff Type window enables you to select any Staff Type that can be added to the Budget.

Similarly, the Select Staff window enables you to select any individual Staff member that can be added to the Budget.

They are accessed by clicking **Select** in the **Staff Types** or **Staff** region, respectively, in the Selected Budget tab.

The two windows are identical, except with regard to Search Criteria. The Select Staff Type window facilitates searches by Staff Type only, whereas a range of Search Criteria can be applied when searching for individual Staff members. The following screenshot illustrates the Select Staff window.



To enter a search:

1. Enter any appropriate **Search Criteria** that would help to narrow the search.
2. Click **Search**.

   Any matching Job records that match the Search Criteria you entered are displayed in the **Search Results**.

   If you need to narrow your search, enter additional Search Criteria and click **Search** again.

   You can also clear individual Search Criteria, or click **Reset** to clear them all and begin again.
3. In the **Search Results**, apply any sort options or filters that will help to refine your selection. See below for details.
4. Select the Staff or Staff Type from the **Search Results**.
5. Click **Add**.

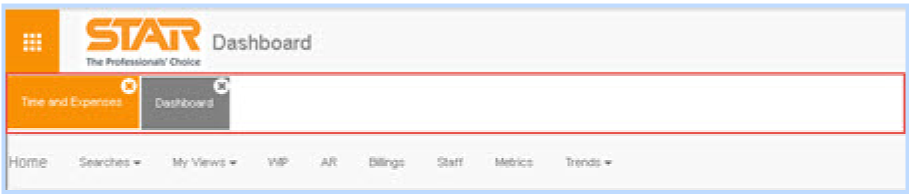
   The selected Staff or Staff Types are added to the **Selected** grid on the right. You can then search for and add further Jobs, as required.
6. Click **Close**. The Selector window is closed and the Staff Types or Staff control is populated with details of the selected Staff Types or Staff.

Setup

The behaviour of the StarPM: Job Budgeting module is affected by multiple settings maintained in Star PDM, and in the Star PDM database via SQL Management.

Module Tabs Auto-hide

In the StarPM application, each open module is represented by a tab in a tab row beneath the HTML Title header.



Open module tabs can be set either to be of fixed display, or to be hidden automatically when not in use. Fixed display prevents vertical interface shifts whenever the user moves their cursor over the header area, thus invoking the tabs' display.

The auto-hide behaviour is controlled by a setting, LauncherAutohide, in Star database table tblPersonalSettings. To enable auto-hide, LauncherAutohide must be set to 1. The default value is 0 (auto-hide disabled).

Firm Switches

The following switches can be found in Star PDM, under Setup/Firm Details/Options/Firm Switches.

Functional Area: Job Budgeting

- **BudgetingUseCategoryRatesForTypes** – When active (on), users can associate the Staff Type column in a budget with a given labour rate when added for a labour rate job. This allows the Staff Type column to use the labour rate defined for the job instead of the standard rates.

  Staff Types are not, by default, associated with labour rates. Rather, they use normal rules to select which rate to use on budgets.

- **BudgetingUseJobRate** – By default, the Charge Account on a budget specifies the rate to be used for given staff members. When this switch is active (on), additional checks are made to determine which rate to use, as follows:
  - Where a labour rate exits, use the labour rate.

    Where labour rates are in use, staff restrictions are also applied to the budget unless the ASTEE switch ASTEEAllowPostingToJSRJobs is active.
  - If the Job is set to use a Charge Account rate, or the Charge Account rate is set to enforce, then the Charge Account defines the rate.
  - If ASTEE switch 162 (Enforce Highest Charge Rate) in Star database table tblASTmastpref is active, use either the rate specified by the Charge Account or the rate specified by the job, whichever has the higher value; otherwise use the rate specified by the job.
- **BudgetRateDiscounts** - When active (on), provides support for WIP Discounting in the Job Budgeting module. To be effective:
  - Discounting must be turned on at both Entity level and Job level.
  - The Firm-level switch BudgetRateDiscounts must be set to 1.
- **JobBudgetEnablePriorYear** - When active (on), activates the Prior Year Analysis tab and enables the Prior Year Link field in the Job Budget, Budget Setup screen), where the user can select:
  - 0 – Off.
  - 1 – Only jobs with the same job group type.
  - 2 – Only jobs with the same job type.
- **JobBudgetPriorJobFilter** - By default, Prior job selection supports entity and service line filtering as standard and only permits the selection of each job as a prior job once. This setting controls additional filtering.
  - 0 – No additional filtering.
  - 1 – Restricts filtering to the same job type as that of the job on which the budget exists.
- **JSPCADESC** - When active (on), a charge code description is displayed instead of the charge code in the budgeting grid.

Functional Area: ASTEE

- **ASTEEAllowPostingToJSRJobs** - When active (on), any users not set up to use JSR rates can to post to a Job using their normal rates.

User-defined Stored Procedures

The following user-defined stored procedures are optional to implement.

Implementation is the responsibility of your system or SQL administrator, in consultation with Star.

Budgeted Margin and Realisation

The Selected Budget tab, Job Details region supports Budget Fee, Budgeted Realisation, and Budgeted Margin. Budgeted Margin and Budgeted Realisation calculations are customisable using the following user-defined stored procedure:

- **ps_sdlc_tblWIP_SELECT_JobBudgetMarginAndRealisation_UserDefined**

Budget Fee is editable with the appropriate UDF privileges.

Prior Year

Prior Year functionality can be fully customised.

The following user-defined stored procedures can be used to define both the layout of the grid on the Prior Year tab (at both levels) and the default calculations that populate it.

- **ps_sdlc_tblJobPriorYearSplits_INSERT_JobBudgetCalcPriorYear_UserDefined**

  This script allows the customisation of the calculations that populate the Prior Year table, as well as the ability to use non-required fields for other purposes.

  Whereas Star provide the standard version of the JobBudgetCalcPriorYear procedure for StarPM, there was no equivalent for WinForms. In any implementation of WinForms Job Budgeting using this functionality, both Web and WinForms procedures should be reviewed to ensure consistency. For example, where an overnight Job process is run to keep figures up-to-date a single procedure can be used only If calculations are the same in both Web and WinForms.

- **ps_sdlc_tblJobPriorYearSplits_SELECT_JobBudget_PYSplits_UserDefined**

  This script allows the customisation of the top level of the Prior Year grid display.

- **ps_sdlc_tblJobPriorYearSplits_SELECT_JobBudget_PYSummary_UserDefined**

  This script allows the customisation of the expanded (drill-down) Prior Year grid display.

- **ps_sdlc_tblJobPriorYearSplits_SELECT_JobBudgetHeaders_UserDefined**

  This script allows both the definition of headers for columns inserted into the Prior Year grid and the customisation of existing column headers, if appropriated for alternative usage. A select statement gives a string titles a field name that matches a column in either grid level, e.g.

  SELECT 'Alternate Use Title' AS [Margin], ...

  Replace Terms are not supported if reserved characters or HTML tags are included in column headers.

Table of Replace Terms

The following standard terms, as used throughout any 'vanilla' installation of [[[Undefined variable Document Variable Set.ProductName]]], can all be replaced by synonyms. This is useful when Star terminology does not reflect the standard lexicon of your organisation.Star refers to such synonyms as Replace Terms.

This Help manual uses standard terms. If your organisation has defined any Replace Terms, you can print the following table and record them for future reference against the relevant Standard Terms.

Standard Term	Replace Term	Standard Term	Replace Term
AddressDetail		GrossWIP	
AdvancedBill		Holiday	
AdvancedReportLink		Interest	
AllowancePremium		Interfunction	
ApprBill		InternalContact	
BadDebt		Job	
BillsInProgressFor		JobAssistant1	
BillsReadyFor		JobReference	
BillTemplate		LastActivity	
BillType		LastBill	
Campaign		LeaveDate	
ChargeAccount		Loss	
Child		Manager	
Children		Nominal	
Claim		NominalAdjustment	
Client		Office	
ClientFirstName		Officer	
ClientGroup		OrigRateAmt	
ClientMobile		Parent	
ClientReference		Partner	
ClientSearchName		PlanningColour	
ClientTelephone1		PopBalancesDate	
ClientTelephone2		PORef	
ClientType		Portfolio	
Clone		Postcode	
Cloning		Profit	
Contact		QuickBill	
ContactFirstName		RevisedFee	
ContactMobile		SecondContact	
ContactReference		SecondPeriodClose	
ContactSecondName		ServiceLine	
ContactTelephone1		ServiceLineGroup	
ContactTelephone2		StaffDepartment	
ContractType		StaffForename	
County		StaffMobile	

Standard Term	Replace Term	Standard Term	Replace Term
CurrentDisb		StaffReference	
CurrentFees		StaffSurname	
CurrentPreBill		StaffTelephone1	
CurrentWIP		StaffTelephone2	
DepartmentsJobs		StaffType	
Disbursement		Stage	
DraftBillsFees		StandardBill	
DraftBillsWIP		StdRateAmt	
Enquiry		Supervisor	
Enrolment		Supplier	
EOMBills		SupplierRef	
EOMDisb		TargetRealisation	
EOMPreBill		Tickler	
EOMWIP		TimeStampField	
Expense		TotalAppr	
ExpenseRepaid		UnapprovedDisb	
Favourite		UnapprovedWIP	
Fee		UnderQuery	
FeeReceipt		VAT	
Fees		VatNumber	
FinanceCharge		WIPatCost	
FixedFee		Workgroup	
GeneralAdjustment			