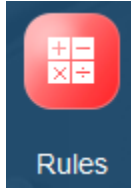


There are two business rules – “A. Copy Adjust Salary” and “A. Copy Adjust Revexp” - that allow you to copy your forecast or budget data from one year to the next. To use either one simply click or tap the Rules icon, then launch the rule.



A new screen will appear asking you to enter your parameters.

**A. Copy Adjust Salary** Launch Cancel

|  |                      |  |                      |
|--|----------------------|--|----------------------|
| * Enter factor (1.03 = an increase of 3%) (.97 = a decrease of 3%) | <input type="text"/> | * Select an Object or Object code rollup | <input type="text"/> |
| * From Year  | <input type="text"/> | * Select the Program                     | <input type="text"/> |
| * From Version   | <input type="text"/> | * Select CREF                            | <input type="text"/> |
| * From Scenario  | <input type="text"/> | * To Year                                | <input type="text"/> |
| * Select an Organization or Organizational Rollup                  | <input type="text"/> | * To Version                             | <input type="text"/> |
| * Select a Fund or Fund Rollup                                     | <input type="text"/> | * To Scenario                            | <input type="text"/> |
| * Select Home Org  | <input type="text"/> |  |                      |

Before you select the information in the boxes, it’s a good practice to write down or type the parameters for the data you want to move. This way, you can double check all of your fields are correct before launching. These business rules are powerful and dangerous since they have the ability to wipe out your data.

Select 1.00 if you want to simply copy the data to another year. Also, you can increase or decrease the copy by a factor as described on the screen. Fill in the other boxes. For the salary object, simply search for the individual object code (e.g. 5010), or K052 for all salaries.

Your screen should look similar to this:

### A. Copy Adjust Salary

\* Enter factor (1.03 = an increase of 3%) (.97 = a decrease of 3%)

\* From Year

\* From Version

\* From Scenario

\* Select an Organization or Organizational Rollup

\* Select a Fund or Fund Rollup

\* Select Home Org

\* Select an Object or Object code rollup

\* Select the Program

\* Select CREF

\* To Year

\* To Version

\* To Scenario

Click or tap the launch button and wait until you see a message that it completed successfully.

The Copy Adjust Revexp business rule operates the same way; except for Object you are selecting the individual Revexp object or object "K" parent. It's recommended that you first copy expenditures (K087) and then your revenue by RCM category (e.g. K009-Tuition and Fees), excluding Investment Income (K015) so that you don't wipe out your pre-populated endowment amounts.

Again, your sheet should look similar to the picture below. Hit or tap Launch and see that it completed successfully.

### A. Copy Adjust Revexp

\* From Year

\* From Version

\* From Scenario

\* Select an Organization or Organizational Rollup

\* Select a Fund or Fund Rollup

\* Select an Object or Object code rollup

\* Select the Program

\* Select CREF

\* To Year

\* To Version

\* To Scenario

\* Enter factor (1.03 = an increase of 3%) (.97 = a decrease of 3%)

Finally, the copied data will go to PennHist the next day, but you can see the revexp and salary results immediately when you do data entry or run the A7 (Account Detail-Non-Compensation) or A8 (Account Detail-Compensation) report.