Overview:

Create groups in the Assign Personnel to Periods section to show more specific task effort, to budget a specific person more than once, or to use a salary object code more than once.

A Personnel group is a visual way to segregate personnel costs for specific activities, and also allows the use of a salary object code more than once in a specific budget period.

Procedure:

In a new or existing budget version, once a 'shopping list' of personnel to be included in the budget has been completed in the Project Personnel section, specific people, TBNs, and summary personnel category line items can be added to the budget in the Assign Personnel to Periods section.

Use groups in the following situations:
- When you want to segregate personnel effort by task or activity within a budget period
- When you need to add both a named person and a summary category for the same personnel salary object code
- To segregate summer period effort for visual review
- To assign the same person to different time periods or activities within a budget period

To create a new group:
- In the Assign Personnel to Periods section, click 'Assign Personnel' button
- Choose an entry in the Person dropdown menu
- Select the corresponding Object Code
- Use the dropdown arrow for Group field, and click the 'Create New Group' option – this is the only place a group can be created
- In the New Group Name field, enter a unique description name – this is **not** editable later
- Complete the effort fields and click 'Assign to Period x' button

The group name will appear in parentheses after the object code name:

To use an existing group:
The next time a person is selected in the Assign Personnel lightbox, the group name will appear in the dropdown for Group field.
- Click to select the group name, or create other new groups as needed.

Example: Summary category line items grouped to allow individuals to be budgeted with the same category

- Create a group called 'Summary category group' for the first summary line item.

- Choose the group for additional summary category entries
- Named persons and category TBNs can then be added individually:

NOTE: Groups exist only in the online Assign Personnel to Periods view for a specific budget version in a proposal (or hierarchy Child proposal). Group information *does not appear* in the online Budget Summary, print reports, or in a proposal hierarchy Parent record budget.