Position Roster (faculty/staff)

WHAT CAN I DO?

- **Update Vacant Positions**
- **Copy a Position**
  - Scroll to the far right of the roster and check the box in the "copy" column on the row of the position you want to copy
  - On the insights panel, click on the blue "copy position" button.
  - The new position will drop to the bottom of the roster within the org and will be titled as "Plan-APXXXX"
    - You can add description under short description column. Once complete, the description will be appended to the position Plan-APXXXX
    - Attributes in purple font can also be edited
- **Delete a Copy Position**
  - Scroll to the far right of the roster and check the box in the "delete" column on the row of the position you want to delete
  - On the insights panel, click on the "delete position" button.
- **Pause Banner Sync**
  - Users can pause the nightly refresh of position updates from Banner when needed. Users can initiate the pause by individual Org or at a higher level (02.05 Position Data Sync Settings).

WHAT DO I NEED TO KNOW?

- Vacant Positions pulled from Banner – please review details
- Vacant **Position Start Date** automatically assigned based on e-class
  - This date can be overridden in the **Position Start Month** column
  - Criteria for assigning **Position Start Date**
    - All Faculty Positions = July 1st
    - Staff S1, S2 = Beginning of 3rd month following vacancy date
    - Staff S3, S4, S5, S6 = Beginning of the following month of vacancy date
- Copy Position does not copy the labor distribution – a labor distribution needs to be assigned
- Staff Only – Compa Ratio reflects where a salary falls in relation to the market
  - salary divided by mid-point of MRR

Position Roster (faculty/staff)

- Hide Columns:
  - Columns cannot be reordered but can be hidden to change view
  - To hide columns, choose the eyeball icon (show/hide): Select **Line items**, choose **select all** and uncheck the columns you do not want to see. *Note:* a line will now appear under the eyeball icon, indicating you have made a change.

Merit Planning (faculty/staff)

WHAT CAN I DO?

- **Apply Merit (% or $)**
- **Apply Other (% or $) – Reason Required**
- **Apply Lump Sum**
- **Assign Not Eligible**
  - Optional
  - Scroll to the far right of the merit screen and check the box in the "not eligible" column for the desired position
  - If selected, cells related to merit setting will grey out

WHAT DO I NEED TO KNOW?

- Unrestricted Merit Pool Balance
  - Reflects the merit pool available to be distributed based on the selection in the key column (far left column)
    - Staff merit pool available also includes staff pooled positions and contingency
    - Faculty merit pool available also includes faculty pooled positions
  - As merit is applied, the balance will decrease relative to the labor distribution
  - Reminder: A lump sum payment is one time and does not impact the merit pool balance
- Hide Columns:
  - Columns cannot be reordered but can be hidden to change view
  - To hide columns, choose the eyeball icon (show/hide): Select **Line items**, choose **select all** and uncheck the columns you do not want to see. *Note:* a line will now appear under the eyeball icon, indicating you have made a change.
- Staff Only – Conditional Formatting
  - **Merit** and **Excess Merit %** columns will turn yellow if the merit applied exceeds the acceptable range defined within the merit guidelines based on the endeavor performance rating. Excess Merit % reflects the amount of merit (%) in excess of the maximum merit guidelines based on the endeavor performance rating.
  - This is a visual flag only and does not prevent you from completing your merit plan.

Labor Distribution by Employee

WHAT CAN I DO?

- **Add a Labor Distribution**
  - To add a future year LD
    - Click “Add Distribution” button and select the employee in the pop-up
    - Select your Fund – Org – Program – Activity (if applicable)
    - Enter “From month” and <u>leave “To Month” blank</u> (unless specific end date is known)
    - Enter “Percent” and click green “Submit” button
- **Delete a Labor Distribution**
  - Scroll to the right of the LD page and check the box in the “delete” column on the row of the labor distribution you want to delete
  - Click on the “delete labor distribution” button

WHAT DO I NEED TO KNOW?

- <u>Current year</u> LD on <u>filled</u> positions <u>cannot</u> be changed or deleted. Any changes need to be completed through the Financial Toolkit (LDC change)
- <u>Current year</u> LD on <u>vacant</u> positions <u>can</u> be changed for the remaining months of the current FY and forward
- Labor Distribution for the current year will roll forward unless you add a future labor distribution to replace
- Submit button will turn green once all required information has been selected or entered
- Labor Distribution Total by Month graph at the bottom of the page will have green indicators for the months the allocation percent equals 100% data and a red indicator for the months the allocation is over or under 100%.
- Labor Distribution Summary is available to view all labor distributions for all employees
  - Users can add/delete distributions on this page

Pooled Labor

WHAT CAN I DO?

- **Add a Labor Pool**
- **Delete a Labor Pool**
    - To add a future year LD
        - Click “Add Distribution” button and select the employee in the pop-up
        - Select your Fund – Org – Program – Activity (if applicable)
        - Enter “From month” and <u>leave “To Month” blank</u> (unless specific end date is known)
        - Enter “Percent” and click green “Submit” button

WHAT DO I NEED TO KNOW?

- Pooled Labor can be planned by fiscal year or across multiple fiscal years
- Pooled labor can be entered by dollars or units
- Pooled labor calculator available
    - Enter Employee Class and Amount Available to Plan
    - Calculator will provide Pooled Amount to plan considering fringe
- Enter contingency pools in July
- Pooled Labor Summary will change based on the context selector at the top, right hand corner of the page

Non-Labor Input (unrestricted/restricted)

WHAT CAN I DO?

- **Update Existing Non-Labor Budget**
- **Add a Non-Labor Budget**
  - Select “All Accounts” in the Insights Panel
  - Enter budget by month in account row
- **Update Revenue Budget**

WHAT DO I NEED TO KNOW?

- Input page is for revenue and non-labor data only. For a consolidated view of the entire budget, see applicable report
- Default view is current year (forecast)
- Editable Data
  - White Cells, Purple Font
- Closed months in current year reflect actuals (cells are gray and cannot be edited)
- Insights Panel Actions
  - Show All Time Periods
  - Show All Accounts
  - View Net Operations Summary (will adjust as work is completed)
  - Add Notes (will not be reflected in export)

Transfers

WHAT CAN I DO?

- **Add a Transfer**
  - Select Add Transfer (Fund/Org will default to the Budget Entity that is selected in the Context Selector)
  - Add a Short Description
  - Complete Select Transfer Details
    - Select Transfer Type (faculty labor, staff labor, endowment spend, indirect cost, non-labor)
    - Account will default to 81071 – Funding Transfer Out
  - Select Program
  - Set Transfer Schedule
    - Select One-Time, if applicable, and choose year
    - Select Recurring, if applicable, and select start year (leave end year blank unless end year is known)
  - Enter Amount in the applicable months (transfer should always be a positive number)
  - Select Add Destination (blue button)
    - Add transfer details (fund, org, program, amount must equal amount above)
  - Select Submit

- **Delete a Transfer**
  - Select the row of transfer to be deleted
  - Check the delete button to the far right
  - Select Delete Transfer

WHAT DO I NEED TO KNOW?

- View Existing Transfers at top of page
- Planning a transfer is a plan only; a JV needs done to make the actual transfer

Self Service - Budget Controls Management

WHAT CAN I DO?

- **Freeze Data Into Continuous Plan**
  - Pauses updates from the workforce planning and transfer pages into your continuous plan. Used to prevent changes made on the other pages from feeding into your continuous plan and influencing the balancing process. Users can initiate the pause by individual Org or at a higher level.
- **Lock Non-Labor Input Pages**
  - Locks the unrestricted and restricted non-labor input pages from the Adopted or Adjusted Budget. Used when you are finished with your budget process. Users can initiate the lock by individual Org or at a higher level.

WHAT DO I NEED TO KNOW?

- Use the context selector to change the Budget Entity to be displayed

WFP Reports

ARP Report Name	Compass Report Name	Compass Location
Vacancy Report – Bi-Weekly Banner	*N/A*	
WFP Compare	*N/A*	
Compensation Performance	***Now Available on Merit Planning Page***	*Merit Planning Page (Exportable)*
Labor Detail	***06.04 LD Impact Report****	*WFP*
Labor Distribution	***06.04 LD Impact Report*** ***06.05 LD Cross-Division Impact Report****	*WFP*
Labor Distribution to Non-Budget Entities	*N/A*	
Labor Summary	***Tableau Staff Report***	*WFP Homepage Link*
	06.01 Vacancy Report (NEW)	*WFP*
	06.02 WFP Roster Summary - Faculty (NEW) ***06.03 WFP Roster Summary – Staff (NEW)***	*WFP*

Adopted Reports

ARP Report Name	Compass Report Name	Compass Location
01 – Unrestricted Balancing	***05.01 Unrestricted Balancing****	*CP*
02 – Unrestricted Balancing by Account	***05.02 Unrestricted Balancing by Account****	*CP*
03 – Restricted Balancing	***05.03 Restricted Fund Balance****	*CP*
04 – Restricted Balancing by Account	***05.04 Restricted Fund Balance by Account****	*CP*
05 – All Funds Pooled Labor	***Now Available on Pooled Labor Planning Page***	*Pooled Labor Planning Page (Exportable)*
06 – All Funds Summary	*Report Build in Process*	
07 – Restricted Fund Balances – Forecast vs. Adopted	*Report Build in Process*	
08 – All Funds Comparison	*Report Build in Process*	
09 – Adopted Budget Detail by Month	***05.02 Unrestricted Balancing by Account*** ***05.04 Restricted Fund Balance by Account***	*CP*
10 – Vacancy Report – Adopted	***Vacancy Report***	*WFP*
11 – Endowment Report by Restricted Fund Type	*Report Build in Process*	
Allocation Reports	***05.08 Unrestricted Allocation Walkforward***	*CP*

These reports require a data sync