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

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

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)

Adopted Budget Cycle ONLY

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 <u>not</u> 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 leave "To Month" blank (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?

- Current year LD on filled positions cannot be changed or deleted. Any changes need to be completed through the Financial Toolkit (LDC change)
- Current year LD on vacant positions can 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