Budget Prep Updates for 2021

Agenda

- New Functionality
- Upcoming Fixes
- Budget Amendment Sneak Peek
- Feedback Session

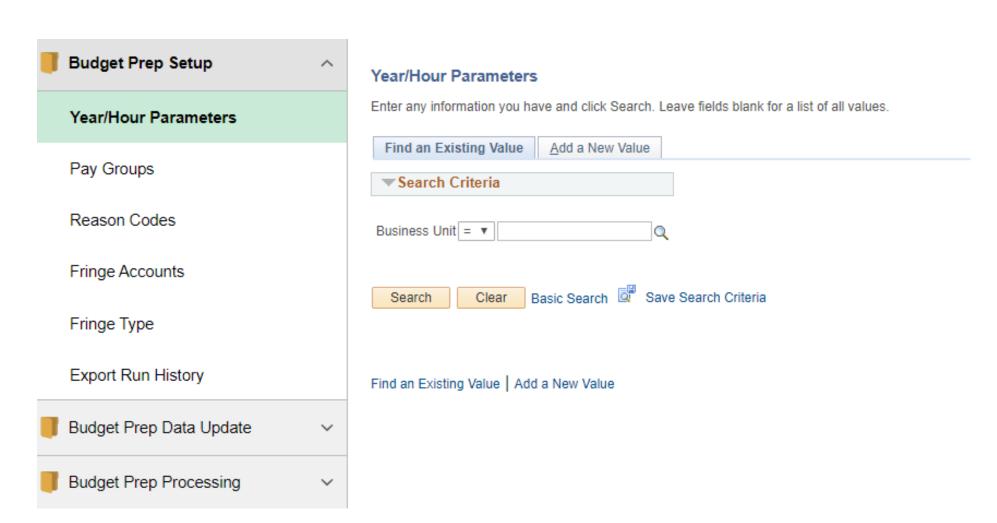


New Functionality – Budget Prep Dashboard

- In progress for Release 5.50:
 - Collects BP navigation items
 - Saves clicks when navigating between multiple pages



New Functionality – Budget Prep Dashboard





New Functionality – Merit Upload

- In progress for Release 5.50:
 - Allows updating Merit, Equity, Promotion, and Supplemental amounts via spreadsheet upload
 - New extract query and staging query
 - New page to upload raises
 - New page to process changes



New Functionality – Merit Upload

Query Name BOR_BP_PERS_SERV_EXPORT

Description Personal Service Export

Working on selection

Top Level of Query

View field properties, or use field as criteria in query statement.

Reorder / So

Fie	lds					Personalize Fi
Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text
1	A.BUSINESS_UNIT - Business Unit	Char5	1			Business Unit
2	A.BUDGET_REF - Budget Reference	Char8	2			Budget Reference
3	A.DEPTID - Department	Char10	3			Department
4	A.POSITION_NBR - Position Number	Char8	4			Position Number
5	A.EMPLID - Empl ID	Char11	5			Empl ID
6	Case when A.EMPLID = 'VACANT' then 'Vacant Position' when A.EMPLID = 'LUMPSM' then 'Lump Sum Positio	Char50				Name
7	A.JOBCODE - Job Code	Char6				Job Code
8	C.DESCR - Description	Char30				Description
9	A.BOR_MERIT_AMT - Merit Amount	SNm17.2				Merit Amount
10	A.BOR_EQUITY_AMT - Equity Adjustment Amount	SNm17.2				Equity Adjustment Amount
11	A.BOR_SUPP_AMT - Supplemental Budget Amount	SNm17.2				Supplemental Budget Amount
12	A.BOR_PROMOTION_AMT - Promotion Amount	SNm17.2				Promotion Amount



New Functionality – Merit Upload

- Raises can be keyed in extract or created in a separate system
- File is uploaded, loads a staging table
- Staging table can be queried to confirm everything looks accurate
- Raises can be processed, pushing data from staging to Budget Prep



Upcoming Fixes

- HCM Import:
 - Will no longer import deleted job rows
 - Adding a way to catch positions dropped in import
- Fringe Update:
 - Corrections to better handle Job Earns Dist
- Budget Prep Load:
 - ABBR
 - Department and Job Entry Dates
- And More!



Budget Amendment Sneak Peek

- Plans not final
- Another tool for managing Position Budgets
- Can use regular Budget Journals and the Amendment interface
- Assumptions:
 - Budget Prep Position Numbers included on Budget Journals
 - Budget Journals JRNL_LN_REF ("Ref") field populated with Position Numbers



Budget Amendment Sneak Peek

• Search:



• Detail Level can be set to "Position" or "Funding Department" level



Budget Amendment – Position Level

Position Number: 100	01000 Empl ID: 12	234567	Rcd#:	0	J	ournal ID:	
HR Dept: 23	45678 Eff Dt: 7/1	1/2019	Seq:	0	В	udget Entry Type:	Ψ.
Original Budget: \$ 60	0,000 Permanent Bu	idget: \$ 5	5,000 Current Sa	lary: \$	48,000 C	Over/Under Budget:	\$ 7,000
Dept Id Fund	Program	Class	Project				
2345678 10000	11100	11000					
Account Distributed Salar	y Original Budget	Perm Amends	Temp Amends	Enc	Exp	Remaining	
521000 24,000.00	30,000.00	(5,000.00)	-	12,000.00	12,000.00	1,000.00	
551000	2,295.00	-	-	918.00	918.00	459.00	
552000	6,342.00	-	-	2,536.80	2,536.80	1,268.40	
553000	7,200.00	-	-	3,600.00	3,600.00	-	
Day Day Dayladı							
	00.00 FICA: \$1	53.00	Retirement:	Ś	422.80	Health/Life	: 600
· ·	00.00 FICA: \$1	53.00	Retirement:	\$	422.80	Health/Life	: 600
Salary: \$ 2,00		53.00 Class		\$	422.80	Health/Life	: 600
Salary: \$ 2,00	Program		Retirement: Project 12345	\$	422.80	Health/Life	: 600
Salary: \$ 2,00 Dept Id Fund 3456789 20000	Program 11100	Class 62000	Project 12345				: 600
Salary: \$ 2,00 Dept Id Fund 3456789 20000 Account Distributed Salary	Program 11100 Original Budget	Class 62000	Project 12345	Enc	422.80 Exp 12,000.00	Health/Life Remaining -	: 600
Dept Id Fund 3456789 20000 Account Distributed Salary	Program 11100 V Original Budget 30,000.00	Class 62000 Perm Amends	Project 12345 Temp Amends	Enc	Ехр	Remaining	: 600
Salary: \$ 2,00 Dept Id Fund 3456789 20000 Account Distributed Salary 521000 24,000.00	Program 11100 Original Budget 30,000.00 2,295.00	Class 62000 Perm Amends -	Project 12345 Temp Amends (6,000.00)	Enc 12,000.00 918.00	Exp 12,000.00 918.00	Remaining - 459.00	: 600
Salary: \$ 2,00 Dept Id Fund 3456789 20000 Account Distributed Salary 521000 24,000.00 551000	Program 11100 V Original Budget 30,000.00 2,295.00 6,342.00	Class 62000 Perm Amends - -	Project 12345 Temp Amends	Enc 12,000.00 918.00 2,536.80	Exp 12,000.00 918.00 2,536.80	Remaining -	: 600
Salary: \$ 2,00 Dept Id Fund 3456789 20000 Account Distributed Salary 521000 24,000.00 551000 552000 553000	Program 11100 Original Budget 30,000.00 2,295.00	Class 62000 Perm Amends - -	Project 12345 Temp Amends (6,000.00) - (1,500.00)	Enc 12,000.00 918.00	Exp 12,000.00 918.00	Remaining - 459.00 (231.60)	: 600
Salary: \$ 2,00 Dept Id Fund 3456789 20000 Account Distributed Salary 521000 24,000.00 551000 552000 553000 Per Pay Period:	Program 11100 V Original Budget 30,000.00 2,295.00 6,342.00	Class 62000 Perm Amends - - - -	Project 12345 Temp Amends (6,000.00) - (1,500.00)	Enc 12,000.00 918.00 2,536.80	Exp 12,000.00 918.00 2,536.80	Remaining - 459.00 (231.60)	



Budget Amendment – Position Level

 Position Number:
 10001000 Empl ID:
 1234567
 Rcd#:
 0
 Journal ID:

 HR Dept:
 2345678 Eff Dt:
 7/1/2019
 Seq:
 0
 Budget Entry Type:
 *

 Original Budget:
 \$ 60,000 Permanent Budget:
 \$ 55,000 Current Salary:
 \$ 48,000 Over/Under Budget:
 \$ 7,000

Position Level summary:

- Position Information Position Number, HR Dept, Effective Date of row
- Incumbent Information ID and Name
- Budget Information Original and Permanent Budgets
- Salary
- Over/Under Budget Compares Salary to Permanent Budget



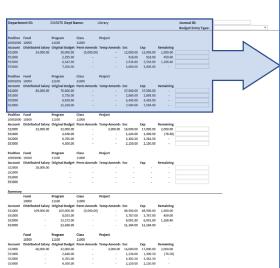
Budget Amendment – Position Level

Dept Id	Fund	Program	Class	Project					
2345678	10000	11100	11000						
Account	Distributed Salary	Original Budget	Perm Amends	Temp Amends	Enc	Exp	Remaining		
521000	24,000.00	30,000.00	(5,000.00)	-	12,000.00	12,000.00	1,000.00		
551000		2,295.00	-	-	918.00	918.00	459.00		
552000		6,342.00	-	-	2,536.80	2,536.80	1,268.40		
553000		7,200.00	-	-	3,600.00	3,600.00	-		
Per Pay Period:									
	Salary: \$ 2,000	0.00 FICA: \$1	153.00	Retirement:	\$	422.80	Health	/Life: 600	

- Each Distribution will have detail by account and input fields
- Amendment and Expense fields will be links, returning journal detail



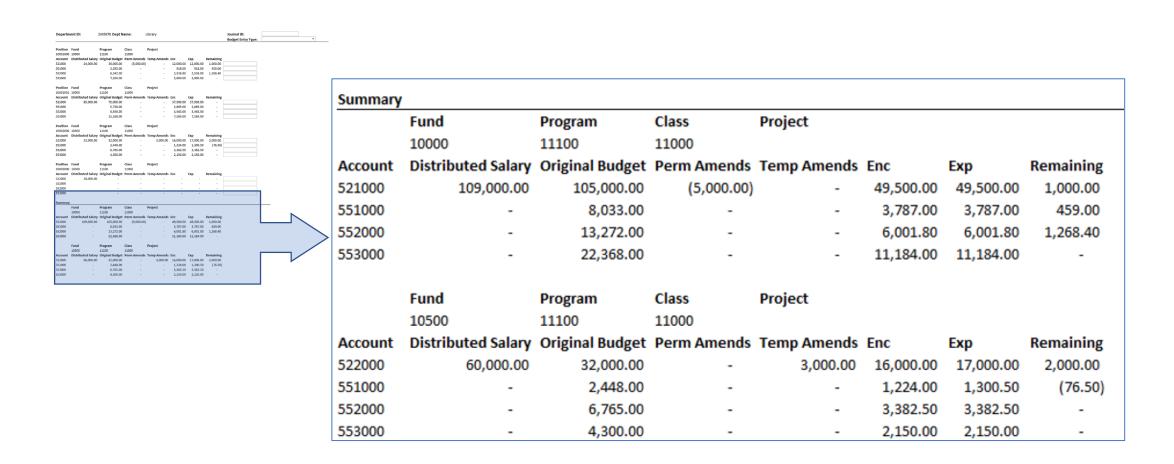
Budget Amendment – Department Level



	Department ID: 23456		2345678 Dept N	45678 Dept Name: L		Library					
>	Position 10001000 Account 521000 551000 552000 553000			Class 11000 Perm Amends (5,000.00) - -	•	Enc 12,000.00 918.00 2,536.80 3,600.00	Exp 12,000.00 918.00 2,536.80 3,600.00	Remaining 1,000.00 459.00 1,268.40			
	Position 10001001 Account 521000 551000 552000 553000			Class 11000 Perm Amends - - -	Project Temp Amends	Enc 37,500.00 2,869.00 3,465.00 7,584.00	Exp 37,500.00 2,869.00 3,465.00 7,584.00	Remaining			



Budget Amendment – Department Level





Feedback Session

- Exclude N (non-paid affiliate) and B (retiree benefits) Paygroups from Budget Prep?
- Additional pages or features in Budget Amendment?
- Remaining pain points, pet peeves, things that just don't quite work the way you'd like?



Available Resources

- <u>Budget Prep User's Guide</u> Will be updated with new features before Budget Prep season
- Budget Prep Queries and Reports Reference

