SF_PBCS User Guide

FISCAL YEAR 2020–21 SF_PBCS INSTRUCTIONS

SAN FRANCISCO STATE UNIVERSITY BUDGET ADMINISTRATION AND OPERATIONS OFFICE

Date Created: 12/11/19

Date Revised: 4/14/21

VERSION CONTROL

Date	Description of Changes	Modified By			
12/11/19	Document created	n/a			
4/13/20	Added Section "Additional Instructions"	BY			
4/20/20	4/20/20 Added additional instructions on printing HTML report and converting to Excel to show GL Account Detail in "Reports Orientation" Section				
5/6/20	Revised instructions for "ADDING INCREMENTAL FTE AND SALARY TO AN EXISITNG POSITION"	BY			
5/14/20	Added subsection "Budgeting for Faculty Early Retirement Program (FERP)	JM			
5/20/20	Added subsection "FIXING ZERO FTE AND ZERO SALARY ON SINGLE INCUMBENT POSITION	MC			
10/13/20	Revised manual in total, including adding CYP section, Report Section	BY			
11/4/2020	Making a salary adjustment on a single incumbent position for Current Year Projection (CYP) by using the Department Roster Form	MC			
4/13/2021	Adding employee to a new position after seed	MC			
4/14/2021	Revised Reports listed in the reports table	BY			

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SECTION 1: SYSTEM INTRODUCTION

OVERVIEW

The SFSU Planning & Budgeting application utilizes Oracle's Enterprise Planning and Budgeting Cloud Service (EPBCS) to create an all funds budget and projection. The application will be responsible for a new position approval process that will track requests throughout the cycle and approval status throughout the budget cycle.

Additionally, financial reports will be available through the application. The following data will be present within the system and available for reports:

- Actuals (PeopleSoft Financials & HR)
- Revised Budget (PeopleSoft Financials)
- Encumbrances (PeopleSoft Financials)
- HR Roster (PeopleSoft HCM)
- Budget (sourced in EPBCS)
- Current Year Project (or Forecast-sourced in EPBCS)

In order to access the application, the following URL should be used with a supported browser, including:

- Firefox (*recommended*)
- Chrome (*recommended*)
- Microsoft Edge
- Safari

https://planning-a431204.pbcs.us2.oraclecloud.com/HyperionPlanning

The home page and associated cards can be accessed one of two ways. Through the standard home page:



And additionally, through selecting the



Navigator: Planners 🔻

Budget	Application	Integration	Reporting
🖾 Budget Review	Overview	Data Load Settings Data Management	Explore Repository Reporting Web Studio
Budget Compensation	🎭 Settings	Create and Manage	Monitor and Explore
Budget OpEx and Revenue	韋 Data Exchange	Action Menus	Task List Report
Budget Other Compensation	📋 Jobs	Alias Tables	Application Diagnostics
Budget Reports	🔆 Configure	Dimensions	System Reports
🚊 Jobs	Tools	Rules Rules	Workflow
СҮР	Access Control	Smart Lists Task Lists	Manage Approvals Approval Unit
D CYP Review	Navigation Flows	Actions	Import and Export
CYP Compensation	Daily Maintenance	Clear Cell Details	
🚘 CYP OpEx and Revenue	- Connections	Copy Data	
CYP Other Compensation	Go Migration	Copy Versions	
CYP Reports	🎎 User Preferences		
Daily Reports	Setup		
Vacancy Savings	Access Simplified Interface		
. Hear Preferencee			

DATA AVAILABILITY

DATA PROCESS FLOW



EXTERNAL SOURCES

DATA TYPE	DESCRIPTION	UPDATE TIME
Actuals, Revised Budget, &	Data at COA detail (non-	Nightly
Encumbrances from PeopleSoft	personnel) coming from	
Financials	PeopleSoft Financials	
Actuals from PeopleSoft HR	Data at personnel detail	Nightly
	(position, employee, job code)	
	that merges payroll actuals with	
	positions	
Current HR Roster	The collection of jobs by	One-time, beginning of Budget
	position along with funding	
	setup in position management	
	for Budget	
Starting Point of CYP (for single	The collection of jobs by	One-time, beginning of CYP
incumbents)	position along with funding	
	setup in position management	
	for CYP	

INTERNAL SOURCES

Due to performance within the application, some data requires additional consolidation prior to being available for full reporting.

DATA TYPE	DESCRIPTION	UPDATE TIME
Summarized Non-	Expense data entered at COA	On-save
Compensation Expenses	detail (non-personnel)	
Summarized Revenue	Revenue data entered at COA	On-save
	detail (non-personnel)	
Detailed Compensation	Salaries and fringe re-calculated	On-save
Expenses	for position-driven expenses at a	
	position-specific level	
Consolidated Compensation	Total of compensation expenses	Scheduled every 30 minutes
Expenses	at a department/fund level	(from 7AM to 11PM PST); note:
		at the beginning of each
		process, compensation data
		will be cleared prior to being
		reloaded

DATA SNAPSHOTS

During the budget cycle, forecasting during a fiscal year, and on specified deadlines, the Budget Office will take snapshots of the data in SF_PBCS. We will always notify the cabinet budget officers of when we

will be taking the snapshots. The snapshots allow for us to capture the data at a specific day/time. Any changes made after the snapshot is taken will not be included in that specific snapshot. You can view the snapshots by changing the Scenario dimension in SF_PBCS.

For example, a snapshot was taken on Friday 5/22/2020 at 1PM. The scenario is named: Bud_FY20_05292020.

In the Budget and CYP modules, there are Reports that the Scenario dimension can be changed.

See below for an example:

P/L Budget Report P/L Budget Report P&L Budget Division R P&L Budget Division R FIL Budget Budget Division R FIL Budget Budget Division R FIL Budget	Aget Division R	Version Working	Department Rost	Fund FD_OPERATING	Depart	Iment Roster	Cancel	
P&L Budget Division R ile Format HTML Period Years Scena YearTotal FY20 Bud_F HTML Preview V Iect a Member Id_FY20_05292020	Report	Version Working	Department DP_SFCMP	Fund FD_OPERATING	3_FUNDS	Ōĸ	Cancel	
'&L Budget Division R ile Format HTML Period Years Scena YearTotal FY20 Bud_F HTML Preview ✓	eport	Version Working	Department DP_SFCMP	Fund FD_OPERATING	3_FUNDS	Ōĸ	Cancel	
ile Format HTML Period Years Scena YearTotal FY20 Bud_F HTML Preview V lect a Member cenario Id_FY20_05292020	► FY20_05292020	Version Working	Department DP_SFCMP	Fund FD_OPERATING	G_FUNDS	Ōĸ	Cancel	
Period Years Scena YearTotal FY20 Bud_F HTML Preview ✓ Iect a Member	ario FY20_05292020	Version Working	Department DP_SFCMP	Fund FD_OPERATING	S_FUNDS	Ōĸ	Cancel	
YearTotal FY20 Bud_F HTML Preview V lect a Member	-γ20_05292020	Working	DP_SFCMP	FD_OPERATING	G_FUNDS	Ōĸ	Cancel	
HTML Preview V lect a Member cenario d_FY20_05292020					ĥõ	<u>о</u> к	Cancel	
ect a Member	1				₿.	<u>ō</u> ĸ	Cancel	
ect a Member	_				No	<u>о</u> к	Cancel	
ect a Member					∎õ	<u>о</u> к	Cancel	
ect a Member					Nõ.	<u></u> <u>o</u> k	Cancel	
enario 1_FY20_05292020								
1_FY20_05292020								
earch Scenario							ø	
Scenario	Bud_	Scenarios						
Act	🗸 Bud_	_FY20_05292020						
Bud								
PyBud								
Frank								
Encumb								
CYP_Scenarios								
Bud_Scenarios								
Variance_Scenarios								

TERMINOLOGY

Position and Operating Expense Data Input Tab Column Definitions:

Dimension	A dimension will represent either a piece of the chart of accounts
	(Fund, Program, etc), an HR segment (Employee, Position, etc.), or a
	PBCS-only dimension required for application usage (Scenario,
	Version, etc)
Member	A single instance of a dimension; for example, Fund NG001 is a
	member of the Fund dimension
	Note: Members within COA-driven dimensions will be prefixed; Fund
	NG001 will be FD_NG001
Breadcrumbs	When using right-click navigation to go from form-to-form, a blue
	hyperlink will appear for the initial launch form that will allow a user
	to click to go back. If using multiple stages of navigation, this may
	create multiple hyperlinks. The trail of these is referred to as
	"breadcrumbs".
Compensation/Comp	The term compensation/comp will be the personnel driven expenses.
	This includes three different levels: Single Incumbent, Pooled, and
	Default. The matching Job Code -> Account mapping drives the detail
	at which the job code/account combination is planned. All of the
	salary expenses will be consolidated and utilize a calculated fringe
	percentage as well.
Single Incumbent	Single Incumbent positions will utilize specific employee(s).
Positions	Generally, 1-to-1 but including occasional exceptions, these single
	incumbent positions will represent the most detailed parts of
	personnel expenses.
Pooled Positions	Pooled positions are those types of positions that are planned by
	position/job code but are consolidated into a single employee
	grouping.
Default Position	Default positions will be used for the remaining salary expenses
	following those covered by single incumbents and pooled positions.
	For example, overtime will be planned at a bulk number.
New Assignment	For existing positions that will require a new employee assignment,
	an additional assignment would be utilized instead of a new request.
	This is because the position has already been approved and only the
	employee assignment is being changed.
New Request	For net new positions, a new request will be needed. This will go
	through the proper approval channels in order to be added to the
	working plan.
Distributed	The term "distributed" will be used to clarify base salary/FTE vs those
FTE/Salary	that are distributed across funding lines. Single Incumbents will see
	"distributed" calculated based on funding set while pools will have
	the distributed elements entered directly.

STANDARD FUNCTIONALITY

MEMBER SELECTION

Member selection will be utilized throughout the application extensively. This section will show how to perform member selection whether it be for calculation prompts, entry form modifications, or user preferences.

Note: The path to get into the member selection screen for each instance above (calculations, forms, etc) will be different, but the ultimate member selection screen will be the same for each. This example will cover the member selection on data forms.

Whenever a blue hyperlink is shown, the selection should be selectable by clicking on the specific member with a left-click. In the example below, both Fund and Department can be selected by clicking "NG001..." or "6020....". The member selection will be driven off which dimension (Fund or Department) is selected.

PRIMARY MEMBER SELECTION

For this example, the Department dimension will be selected by clicking "6020....".

Planner: All Expenses Detail 0

 Fund
 Department

 NG001-GENERAL SUPPORT & STUDENT FEES
 6020-BUDGET_ADMIN_&_OPER_OFFICE

 VeerTotal
 VeerTotal

After selection, the member selection box brings up a list of available alternate members. The member box will always be filtered by the following:

- 1. Security only members with proper security will be shown
- 2. System filter in some cases, only some member selections are relevant and will be hidden

There are a couple specific areas to focus on in getting oriented with the member selection screen below:

- The current selection is shown in two places:
 - Directly underneath the dimension header at the top of dialogue box
 - Within the member selection area WITH a **<u>blue checkmark</u>**
- There will be a hierarchy path at the bottom of the member selection screen (Department->SFCMP->Administration & Finance->DP_BUDGET_AND_ADMINISTRATION). Since each of these are blue hyperlinks, they can be selected. This will help to navigate back to higher levels
- Additionally, the "Search Department" field can be used to search for any part of the new member. In the example below "6022" or "BUDGET" could be used as key worlds to search for 6022-CMS_-_BUDGET_OFFICE
 - Note: After typing the key word in, select "Enter" to perform the search

• Lastly, the icon can be used to modify select display/filter options. For example, the "Show Alias" option (shown in second image) can be selected to show full descriptions if only the system members are displaying

Select a Member				6	<u>0</u> K	Cancel
Department "6020-BUDGET_ADMIN&_OPEROFFICE"						
Search Department						-\$\$F
Audit a Autoory Octaioco	DP B	UDGET ADMINISTRATION				
DP_BUDGET_ADMINISTRATION	6020-					
Business Operations	► B0D0					
Facilties Services	► 6025-	UNIV. & BUDGET PLANNING				
Fiscal Affairs/Controller	•					
Human Resources	F					
Information Technology	•					
Housing Dining & Conf Services	F					
VP Admin & Finance	•					
VP Admin & Finance - Other	► •					
4						Þ
Members Department>	SFCMP> Administ	tration & Finance> DP_BUDGET_AD	MINISTRATION		*	

	¢	F
Ę	Add Filter	
~	Show Alias	
~	Show Member Counts	
~	Sort Alphabetically	
43	Refresh	
×	Clear Selection	
~	Show Invalid Members	

To use the hierarchy structure...

- Select the **b** icon. This must be specifically clicked to go to the next level
- In the left pane below, Administration & Finance represents the previous parent level and DP_BUDGET_ADMINISTRATION represents the direct parent level
- The middle pane then has DP_BUDGET_ADMINISTRATION as the direct parent level with the available detailed departments as selectable

To select a new member...

- Either find the member using the above hierarchy structure or using the search functionality
- Click the desired member to make a new member selection. If selected correctly, the following will happen
 - The selected member will have a blue checkmark,



- The member will show up under the dimension
- Note: Do **NOT** click the **b** icon to make a member selection
- Once selected, select "OK"

Department 6022-CMSBUDGET_OFFICE Search Department Administration & Finance				
Search Department Administration & Finance				
Administration & Finance				
		^	DP_BUDGET_ADMINISTRATION	
Audit & Advisory Services	•		6020- BUDGET_ADMIN&_OPEROF	
DP_BUDGET_ADMINISTRATION	•		✓ 6022-CMSBUDGET_OFFICE	
Business Operations	•	Ľ	6025-UNIV&_BUDGET_PLANNING	
Facilties Services	•			
Fiscal Affairs/Controller	•			
Human Resources	•			
Information Technology	•			
Housing Dining & Conf Services	•			
VP Admin & Finance		•		

Once selected, the box will show as yellow (shown below). Whenever anything in the system shows as yellow (data or member selection), it means that a submission is needed to complete the action. In this

case, the

button must be selected to apply the new selection.

s	Department 6022-CMSBUDGET_OFFICE	+

ALTERNATE MEMBER SELECTION - FORM ONLY

Alternatively, a small member set may allow for a faster member selection specifically on data forms. Select the pencil icon to open up a quick member selection.



The current member selections for each applicable dimension will show on the form (if available for this member selection). In the example below, both the fund and department dimensions show the current member selections, inclucing the "6022" selection made with the previous section.



Change the fund and/or department selections to the new members. In this case, the fund "CF001" has been chosen. Select "Apply" to submit the member selections.

	A	Apply	Clear	Cancel
Fund	CF001-AM GENERAL FUND	IC - 001	▼ 4	
Department	6022-CMSBUDGET_OFFIC		▼ ^C C	

Note: Select the button to go into the standard member selection screen if the list is too long.

SUBMITTING DATA

STANDARD SUBMISSION

Data submission will drive how data is both entered and officially submitted into the planning and budgeting system. There are two steps to submitting data:

- Enter data into a writeable (white) cell
 - \circ $\,$ Cell will turn yellow to signal that it has been modified with no submission
 - Note: At this point, rollups (i.e. Communications below) will NOT reflect the updated number until submitted
- Click the submit button
 - o Data is officially submitted to the database
 - o Roll-ups within the form show the effects of the updated data
 - o Certain calculations are run following the submission as well'

	YearTotal	YearTotal	YearTotal	HearTotal	
	Act	RvBud	Bud	Bud	
	Final	Final	Final	Working	
	FY 18-19	FY 19-20	FY 19-20	FY 19-20	
	All Programs	All Programs	All Programs	No Program	
604090-Other Communications	35			12	
□ Communications	35				
606001-Travel In State	4,360	5,400		24	
Travel	4,360	5,400		24	
613001-Contractual Services		0			
Contractual Services		0			
616002-I/T Hardware Capital		1,346			
616802-It Hardware Non-Capital	1,335	5,628			

In the example below, data has been entered into 604090-Other Communications.

Select the "Save" button to officially submit data into the database. There is no "Undo" functionality here. However, you have the ability to clear the data afterwards by simply hitting the "Delete" key to clear out the data contents. Note: Another "Save" would be needed as well.

Note: Do NOT select "Refresh" unless truly needing to reload the form. This will NOT submit the data but rather just reset the data entry form.



YEARTOTAL VS MONTHS

The following forms/processes will have the ability to enter at different period levels: Natural Account Compensation, Operating Expense, and Revenue forms. They are as followed:

- Annual Entry: Click into any available white cell at the YearTotal level (shown below)
- Monthly and/or Quarterly Entry: Select the icon next to YearTotal to expand to quarters.
 Continue to expand as needed. Select into each appropriate month/quarter as-needed.

Once selecting a writeable cell, put in the new number. If typing directly into a summarized period, the data will be spread based on any existing weight of each month. For example, a fully blank intersection will have an equal 12-month spread. If all data currently resides in July, then the new entry would still put the full new balance in July.

If entering in monthly, the summarized periods will change as data is entered into each month/quarter.

Any cell that has been modified, either directly or due to a spread, will turn yellow.

All Budget Expenses | Program Revenue | All Budget Expenses (Unsuppressed) | Program Revenue (Unsuppressed)

Planner: Program Revenue by Department and Fund 0

Fund NG001-GENERAL	SUPPORT & STUDENT FEES 002	artment 0-BUDGET_ADMI	N&_OPEROFF	FICE		
		Actual	Revised Budget	Revised Budget	Original Budget	
		Fin	al	Final	Working	
		FY 1	8-19	FY 19-20	FY 19-20	
		YearTotal	YearTotal	YearTotal	YearTotal	
1102-Next Spring	501001-State University Tuition Fee				3,600	
	501802-Transcripts				2,400	

As an example, the following data was spread to periods under YearTotal as well, even though data was put directly into YearTotal:

												l
				FY 19	-20							
_												
	1-July	2-August	3-September	Q1	+	Q2	+	Q3	+	Q4	YearTotal	
	300	300	300	900		900		900		900	3,600	l
	200	200	200	600		600		600		600	2,400	



Save . Data will be submitted to the database and reload Change all cells as necessary, and select as-needed.

ACTION MENUS

ACTION MENU OVERVIEW

Within each data entry form, a select number of actions will be available for actions such as:

- Custom calculations (i.e. Add Requested Position, Add New Line, etc)
- Custom navigations to other forms (Go To....)
- Out of the box form options

These action members will be available either through selecting the "Actions" icon (shown below) or by right-clicking on any part of the grid (next step).

Note: Only the actions that affect the <u>full</u> grid will be available through the "Actions" icon. Generally, a right-click will be preferred.

	Actions -	
G	Go to Department Workforce Detail	d
G	GL Detail	
	Filter •	
	Sort •	
1	Analyze	
-	New Ad Hoc Grid	
	Predictive Planning	
+ - × ÷	Business Rules	
	Smart Push Details	
IJ	Grid Validation Messages	
	Clear Formatting	
	Spreadsheet Export	
	Open in Smart View	

For actions specific to portions of the form, right-clicking will be vital. For example, there will be "launch" forms that exist.

- Department roster shows all employees that are active for a selected department
- A right-click navigation will allow for a user to navigate from the roster form to view a specific employee
- To accomplish the navigation successfully, the right-click would need to be performed specifically on the desired employee

The following types of options are available on each right-click:

- Custom calculations and/or navigations
 - Ex. Go To Department Workforce Detail
 - Ex. GL Detail
 - In some cases, these options are *required*, depending on the action that needs to be performed
- Edit & Adjust
 - Shortcuts to making data modifications (*optional*)
- Comments
 - Right-click commenting that can be performed by each user with proper access to the intersection

- Note: These comments can be stacked (meaning multiple comments can exist in the same cell)
- Note: These comments will <u>NOT</u> show up on reports and should be used for specific tracking only; comment text fields (show up on the form similar to data) will be prioritized
- Supporting Detail
 - o Alternate mode of populating data in the selected cell
 - For example, a single travel account could be updated with a breakdown of types of travel that are added together
 - Note: Supporting Detail will <u>NOT</u> show up on reports and should be used for userspecific tracking only
- Change History
 - The entering of data into each cell will be recorded for audit purposes along with the old value, new value, username, and date of change
 - Note: The change history is specific to a user making a specific data change; systematic changes are NOT recorded
 - Example: Fringe calculations will not show up in the change history location, but manual changes to an employee's salary would

To select a menu option, simply left-click the desired option.



ACTION MENU – RIGHT CLICKING

Throughout the application, right-clicks menus will be used extensively to handle on-demand calculations and form navigation. Each time a right-click is completed, it captures the members that were selected into "context". This context is then used within calculations and form navigation. Example: Right-clicking on FD_NG001 to add a new funding line would default the prompts to show FD_NG001. Additional information has bee provided below as well.

- 1. When performing a right-click action that uses members on the form, right-click to the most right of the existing line that is desired. The "context" that was mentioned above will then be able to pick up the right-clicked member in addition to all members to the left
- 2. Right-click on the specific line that needs to be used; for example, right-clicking on a line with a parent department value (DP_BUDGET_ADMINISTRATION in screenshot below) to navigate to a form that utilizes a detailed department would not return the expected results
- 3. If performing a right-click to add a new line, try to utilize an existing line that is close. For example, adding a new funding line to a position may be requiring a new funding source with a new fund. If the same department is being used, ensure that the right-click happens on the department that is being re-used. This will default the department into the prompt, saving time from having to select.

Example

In the screenshot below, the parent members of Operating Funds (Fund) and DP_BUDGET_ADMINISTRATION (Department) show at the top, along with breakdowns for Salary & Wages plus Operating Expenses. The second line shows the detailed line that make up this total.

Operating Funds	DP_BUDGET_ADMINISTRATION	Salary & Wages
		Operating Expenses
NG001-GENERAL SUPPORT & STUDENT FEES	6020-BUDGET_ADMIN&_OPEROFFICE	Salary & Wages
		Operating Expenses

- Question: Where would a right-click need to be to happen if trying to navigate to a form that expects a single, detailed department member to be selected?
 - Answer: The right-click should be performed on 6020-BUDGET_ADMIN_&OPER._OFFICE. This is because it is to the RIGHT of the Fund, and the right-click needs to be on the right-most relevant member. Additionally, DP_BUDGET_ADMINISTRATION is not a detailed member, so it would not be a relevant selection.
- Question: Where would a right-click need to happen if trying to navigate to a form that expects both a single, detailed department AND a single, detailed fund?
 - Answer, similar to the above example, the right-click would need to happen on the 6020... member since it is the right-most relevant member. By selecting the department, the fund would also be picked up.
- Question: Where would the right-click need to happen if trying to capture Salary & Wages in addition to the department/fund combination?
 - Unlike the previous two, the right-click has to go even farther to the right now since "Salary & Wages" represents the right-most selection. The right-click must be on "Salary & Wages" on the specific line that specifies NG001 and 6020. Since "Salary & Wages" is the right-most member, it will also take the fund and department.

REPORT ORIENTATION

STANDARD FUNCTIONALITY

Within reporting, functionality will be similar to the rest of the application. However, there are a few considerations:

User Point of View

- The "User Point of View" represents the member selections available to drive the point of view of the report. In the screenshot below, there are four options (Years, Version, Department, and Fund)
- The member selection options may change as you go through either forms or reports
 - For example: When accessing the Department Roster form, you may choose a single department
 - If you then navigate to a report which utilizes "Department", it will show the last selection
- If changing the members, select the blue hyperlink showing for the selected member and follow the previous member selection instructions
- Reports will be refreshed with updated data each time the point of view is modified; additionally, the report header will reflect any applicable updates as well

File Format

•

- The following file formats are available for each report:
 - o Excel
 - o PDF
 - o HTML
 - Only HTML has the ability to engage in additional navigations within the grid
 - Ex. Drilling to other reports
 - Ex. Expanding a parent to see more detail

SF STATE	PROD Plan	nning and Budg	geting Cloud: S	FSU							6
					M				8	Ê	
					Budget Review	Budget Compensation	Budget OpEx and Revenue	Budget Other Compensation	Budget Reports	Jobs	
P/L Budget Re P&L ar File Formar Years	eport P/L Burner	dget Division R eport Department	Report Depart	ment Roster Act	vs Bud Departm	ent Roster					
FY20 HTML Previe	Assumption	DP_3058	FD_All_Funds								
	(San Fra	NCISCO			3058-CE	San Francisco P&L and I L GF SUPPOR	State University FTE Report RT-HOLDING ACC	OUNT	

EXPANDING A PARENT

Within each form, there may be a small triangle next to a member. If this triangle is visible, the parent can be drilled further into. For example, the screenshot below identifies the parent "Benefits" which exists on a specified report. The arrow next to it means that the parent can be further expanded.

ороганну шоонн	
Benefits	

Once expanded, any applicable detail will appear under the parent. In the example below, three further subtotals appear with an additional triangle next to the member. This means that the member can be further broken down.

Alternatively, "Benefits" can be collapsed by selecting the altered triangle icon.

Employment Related Benefits

Health Related Benefits

- Retirement Benefits
- Benefits

Note that if you are looking to download the report into excel, in order to see the GL account detail in the report you will have to open the report in HTML, expand on the grey arrows (See above instructions). Once you have expanded on the grey arrows you will then change the file format from "HTML Preview" to "Export to Excel". This option can be found under the report filters.

ile Format	HTML	~		
Years FY20	Version Working	Department DP_ADMINISTRAT	ION_&_FINANCE	Fund FD_OPERATING_FUNDS
HTML Preview	w V			

.

There may be a desire to check previously run calculations/jobs in case there is any confusion. For example, you may have thought you add a new position request but do not see the position available in the specific roster form selected. To confirm where the position was added, you can navigate to "Jobs" icon within both the Budget and Forecast icons.

Additionally, the jobs area will show job failures if applicable. For example, only single incumbent positions can be requested. If a pooled position is requested, the job will return a failure that will also show in this Jobs screen.

					-		
		Budget Review	Budget Compensation	Budget OpEx and Revenue	Budget Other Compensation	Budget Reports	Jobs
Rec	ent A	ctivity					
	+ - × -	WPLN: Planner Completed Now	r - Request New	Single Incumbent			
			Admin Buch	ctuale WPI N to M	IDDT		

Selecting into the job (i.e. WPLN: Planner – Request Single Incumbent) will show the details associated with the job.

Job Details

Application Name SFSU Cube SFSUWPIn Job Status Completed	Start Time 12/2/19 6:27:54 AM End Time 12/2/19 6:27:54 AM
Prompt Text	Prompt Value
Enter DeptID:	"DP_6020"
Enter Employee:	"EM_VACANT"
Enter Job Code:	"JC_1038"
Select Start Month for New Position: Child Jobs	"Jul"
Type Name	

Note: The history will be cleared out after a period of time, however, each job should remain for at least a few days.

INITIAL SETUP

As a one-time setup (can be multiple times if other preferences are utilized throughout the application), a few user variable options will have to be initially set. Once set the first time, they will be able to be changed throughout data entry forms without having to go back to this user preferences area.

	20	
From the home page, select	User Preferences	icon. If this home page is not showing, select either the
icon or the	ROD icon to go	back to the home page.



Select the "User Variables" option.

User Variables

Use the icon next to each User Variable to populate a member option within each user variable. These user variables will be used to drive certain types of forms. To begin, the Budget Office teams recommends setting the options to the following:

- <u>VarDepartment</u>: Set to the second lowest option for which you have security (unless security is only at the lowest level). This can be changed later, but the more detailed selection will allow for entry forms to load faster during initial orientation.
- <u>VarJobCode</u>: Set to "JC_ALL" initially to confirm all appointments are captured in each form. Going forward, this selection can be modified on select form(s) to allow for only specified job code groupings to be shown.
- <u>Review Department</u>: Set the same as "VarDepartment". This variable will be used for reviewing data and will not be as volatile as the "VarDepartment" variable. To prevent both variables conflict, they have been separated.
- <u>**Review Fund</u>**: Set to "FD_All_Funds". This variable will be used in coordination with "Review Department" to show the totals at the selected members as well as each Department-Fund combination with data. Note that this variable can be changed later to focus on fund groupings, such as General Funds only.</u>

Dimension	User Variable	Member
Department	Review Department	
Fund	Review Fund	
Department	VarDepartment	
Job Code	VarJobCode	

User Variables

After each has a selection, select the selected, the affected forms will return an error. Should this happen, repeat this step.

User Variables

Dimension	User Variable	Member
Department	Review Department	DP_BUDGET_ADMINISTRATION
Fund	Review Fund	FD_AII_Funds
Department	VarDepartment	DP_COLLEGE_OF_BUSINESS
Job Code	VarJobCode	JC_E99

Additionally, there will be optional preferences that can be set by each user. Display and time zone options will be defaulted based on administrative setup; however, they can also be changed for each user if desired.

Preferences				
General	General			
Display	Profile			
Notifications		Time Zone (UTC-08:00) Los Angeles - Pacific Time	•	
Ad Hoc Options		Language English	•	
User Variables		Profile Image Browse		
Financial Reports	tyler.feddersen@performancearchitects.com	Supported formats: .jpg, .png, and .gif.		
Form Printing	Alias Setting			
Preferences				
General	Display			
Display	Number Formatting			
Notifications		Thousands Separator	Comma	~
Ad Hoc Options		Decimal Separator	Dot	•
User Variables		Negative Sign	Prefixed Minus	•
Financial Reports		Negative Color	Red	•
Form Printing	Page Options			
		Indentation of Members	Indent level 0 members only	•
		Number of Items on the Page Drop-down	100	
	Other Options			
		Show Consolidation Operators	Form Setting	•
		Date Format	Automatically Detect	•

For each additional set of changes, ensure the save icon is selected. Once completed, go back to the

home screen by selection the

icon.

SECTION 2: NAVIGATION OVERVIEW - BUDGET

To provide a guided approach through the completion of the budget, a specific "Navigation Flow" has been created as shown below. By selecting the "Budget" icon, a series of nested icons will be displayed. To start with the navigation flow, select the "Budget Review" icon.

Note: Once comfortable with the capabilities of each icon, any of the icons can be selected to launch the Budget flow.

Note: If an error shows on opening, refer to the "INITIAL SETUP" section to set user variable preferences.



Once opened, the same icons will show across the top for easy access. A definition of each is provided below:



Budget Review

 Displays read-only forms that can be used to review and/or launch into more detailed forms Note: "Launch forms" are summary forms that allow for right-click navigation to detailed forms for specific data entry

Budget Compensation

- Contains the process for maintain Single Incumbent positions ONLY
- Also contains position request review process
- Note: Entries in this process will utilize the 30-minute (7AM-11PM PST) schedule to update data in the "Budget Review" section

Budget OpEx and Revenue

- o Includes standard forms for both non-compensation expenses and revenue by program
- Note: Entries in this process will be updated on-save to update data in the "Budget Review" section

Budget Other Compensation

- Contains the remaining compensation processes outside of single incumbents, including pools and natural accounts (i.e. overtime)
- Note: Entries in this process will utilize the 30-minute (7AM-11PM PST) schedule to update data in the "Budget Review" section

Budget Reports

- o Contains financial reports to offer canned, formatted reports
- Note: These reports are meant to be quick, formatted reports that can be opened in PDF, HTML, or Excel; they are NOT meant to act as interactive dashboards nor as "launch forms" similar to those in "Budget Review"

• <u>Jobs</u>

- Tracks all calculations that have been run by each individual user, allowing each user to refer back to prior jobs that have been run in the case of failure or reminder
- Note: Job history will be cleared after approximately a week

BUDGET REVIEW

The "Budget Review" icon can be used for a general review in addition to a launch form. This overview will utilize the "Review Fund" and "Review Department" variables that were set in the initial setup section.

Tabs	Description	Additional Notes
Planner: Review Budget	Displays the total associated with the selected Fund and Department subtotal members for Actuals, Budget, and Revised Budget. Additionally, this will display all detailed fund + department combinations that have data. By right-clicking on the DEPARTMENT of this fund, navigation to every major "by Department" form will be possible.	 The "Salaries & Wages" data for the current Budget will be updated with the 30-minute (7AM-11PM PST) scheduled process Right-click on specific department members to use navigation as-needed The "Review Fund" and "Review Department" options can be modified from this form as well to show varying levels of data

BUDGET COMPENSATION

To allow for additional navigation capability, the "Budget Compensation" icon will utilize two forms of tabs: vertical and horizontal. The vertical tabs will drive the available horizontal tabs.

ROSTER (VERTICAL TAB 1)

The following forms will drive roster modifications, including the management of position requests. Note: The department used in these forms represents the owner of the position. The department(s) responsible for funding are handled in the next section.

Ex. If a department pays for a position but does not own the position within HR, then the position would not show in these roster forms.

Tabs	Description	Additional Notes
Department Roster	Allows for modification of all Employee/Position/Job Code appointments that are <u>owned</u> by the selected department. These appointments are populated either from the initial HR load or through on-demand calculations. <i>Funding is not shown on this</i> <i>form.</i>	 These appointments are populated either from the initial HR load or through on-demand calculations All position management calculations can be performed here All funding forms can be accessed from here
Department Roster by User Variable	Allows for modification of the same as Department Roster but allows for multiple departments to be modified all together.	 Utilizes a user variable set in the initial setup screens (<i>must be set before</i> <i>opening</i>) Same options as Department Roster
Department Roster by Job Code	Allows for modification of the same as Department Roster but is ordered with Job Code as the first column to group by Job Code.	 Same options as Department Roster
Salary Adjustments	Overview form to show all appointments under the selected user variable that have been given a salary adjustment. This form can be used to review salary adjustments for a division.	 Utilizes a user variable set in the initial setup screens (<i>must be set before</i> <i>opening</i>) Contains navigational options to go to other forms to see more information on the displayed appointments

FUNDING (VERTICAL TAB 2)

The following forms will drive funding modifications, including the funding associated with requested positions. Note: The department used in these forms represents the funding of the position. The department(s) responsible for the ownership of the position are handled in the previous section.

Ex. If a department owns the position within HR but does not pay for the position, then the position will not show up in these forms.

Tabs	Description	Additional Notes
Department Funding	Allows for modification of all requested and approved funding by Employee/Position/Job Code/Fund for a selected department.	 These funding lines are populated either from the initial HR load or through on-demand calculations All funding calculations can be performed here All funding forms can be accessed from here
Employee Funding	Allows for modification of all requested and approved funding by Position/Job Code/Department/Fund for a selected employee.	 Same options as Department Funding
Position Funding	Allows for modification of all requested and approved funding by Employee/Job Code/Department/Fund for a selected position.	 Same options as Department Funding

REQUESTS (VERTICAL TAB 3)

The following forms will show the overview of new position requests at each stage: Current, Reviewed, and Approved. Requests will show up under roster and funding forms for modification, but they will not affect the budget until approved.

Tabs	Description	Additional Notes
Current Requests	Shows all outstanding position requests, inclusive of funding, that have not been moved to a reviewed status yet.	 Requests can additionally be managed from this area; only users with proper access can move a request to reviewed
Reviewed	Shows all positions requests, inclusive of funding, that have been marked as reviewed but have not been fully approved yet.	 Requests can additionally be managed from this area; only users with proper access can move a request to approved

		•	Requests in this state can no longer be removed by the initial requestor
Approved	Shows all position requests, inclusive of funding, that have been fully approved.	•	Position requests that have been approved should additionally show up in the working budget. Requests in this state can no longer be removed from the budget unless the system administrator removes it

BUDGET OPEX AND REVENUE

The forms related to Operating Expenses and Revenue will show in the "Budget OpEx & Revenue" icon. This will contain two versions of each: one suppressed and one unsuppressed. To fully utilize historydriven expense and/or revenue entry, the suppressed versions should be heavily used. When needing to add new data combinations with no historical data, the unsuppressed versions of the forms can be used.

Note: Once data is added to the unsuppressed form(s), it will additionally show in the suppressed forms going forward. Thus, the unsuppressed forms should generally only be used when needing to add new combinations of data.

Tabs	Description	Additional Notes
All Budget Expenses	Allows for the modification of all non-salary and benefit expenses at a No Program level by a selected Department/Fund combination for accounts with current or past data.	 Only shows intersections with data either in the working budget or in one of the historical data columns Note: This form can additionally be accessed via the Budget Review option, which can assist in the Department/Fund selection. Data updated on this form will be fully consolidated on-save.
Program Revenue	Allows for the modification of all revenues by program by a selected Department/Fund combination for account/program combinations with current or past data.	 Only shows intersections with data either in the working budget or in one of the historical data columns Note: This form can additionally be accessed via the Budget Review option, which can assist in the Department/Fund selection

		• [\ C	Data updated on this form will be fully consolidated on-save
All Budget Expenses (Unsuppressed)	Allows for the modification of all non-salary and benefit expenses at a No Program level by a selected Department/Fund combination for ALL accounts.	 S f t r v v t 	Shows all available accounts for the selected intersection to allow for the addition of new expense lines Data updated on this form will be fully consolidated on-save and available through the suppressed "All Budget Expenses" form
Program Revenue (Unsuppressed)	Allows for the modification of all revenues by a selected Department/Fund/Program combination for ALL accounts.	 S f t r v v t 	Shows all available accounts for the selected intersection to allow for the addition of new expense lines Data updated on this form will be fully consolidated on-save and available through the suppressed "Program Revenue" form

BUDGET OTHER COMPENSATION

The forms related to pools and GL-driven compensation will show in the "Budget Other Compensation" icon.

Note: Once data is added to the unsuppressed form(s), it will additionally show in the suppressed forms going forward. Thus, the unsuppressed forms should generally only be used when needing to add new combinations of data.

Tabs	Description	Additional Notes
Pools	Allows for the modification of all pool lines by the selected department. Unlike the other position forms, pools are only handled via a single funding form without any concern for the "owner".	 Additional pool funding can be added through a right- click functionality Data modified on this form will be fully consolidated through the 30-minute (7AM- 11PM PST) scheduled process
Pools by Department Variable	Same as the "Pools" option but allows for the modification of pools for all departments under the selected user variable	 Same functionality as Pools Utilizes a user variable set in the initial setup screens (<i>must be set before opening</i>)

Natural Account Compensation	Allows for the modification of all salary expenses that fall outside of standard positions and pools (i.e. Workstudy). This form will be used similar to the standard OpEx entry.	 Only shows intersections with data either in the working budget or in one of the historical data columns Note: This form can additionally be accessed via the Budget Review option Data modified on this form will be fully consolidated through the 30-minute (7AM-11PM PST) scheduled process
Natural Account Compensation (Unsuppressed)	Allows for the modification of all salary expenses that fall outside of standard positions and pools (i.e. Workstudy) for ALL available accounts.	 Shows all available accounts for the selected intersection to allow for the addition of new natural account compensation Data updated on this form will be available through the suppressed "Natural Account Compensation" form once submitted

BUDGET REPORTS

The "Budget Reports" icon will hold relevant financial reports to the budget cycle. These reports are meant to be canned, structured reports that can be run within HTML, PDF, or Excel.

Tabs	Description	Additional Notes
P/L Budget Report	Shows a P&L vs Actuals for the selected prompts of: Years, Version, Department, and Fund Note: Actuals will always show the selected Year - 1	 Version should be one of Working, Final, or a designated snapshot Department can be any level of the Department dimension Fund can be any level of the Fund dimension
P/L Budget Division Report	Shows a P&L similar to P&L Budget Report but removes Actuals and shows the selection for Department plus the level underneath Department. Prompts include: Years, Version, Scenario, Department, and Fund	 Version should be one of Working, Final, or a designated snapshot Scenario can be any primary scenario, including Bud, Act, Enc, and RvBud Department can be any level of the Department dimension

		•	Fund can be any level of the Fund dimension
Department Roster Act vs Bud	Shows all appointment funding under selected department and fund selections. Data includes Actuals, the initial load from HR that seeded the budget, and the working budget. Prompts include: Period, Department, and Fund	•	Department can be any level of the Department dimension Fund can be any level of the Fund dimension <i>Period should be a single</i> <i>month; if a summarized</i> <i>period is selected, FTE will</i> <i>NOT show correctly</i>
Department Roster	Shows all appointments for a given scenario/version/year combination along with the build- up of salaries, benefits, and taxes into a total compensation amount.	•	Version should be one of Working, Final, or a designated snapshot Scenario can be any primary scenario, including Bud and Act Department can be any level of the Department dimension

JOBS (OPTIONAL)

The "Jobs" icon will hold the jobs that have been previously run. This section is optional for those that need to monitor long-running jobs or refer to past jobs, whether successful or not.

ALL FUNDS BUDGET PROCESSES

The processes below are supported within the SFSU Planning & Budgeting application for an all funds budget. To simplify this process,

Note: All data for this guide utilizes simulated data to protect data sensitivity and should NOT be utilized for any form of financial reporting beyond examples.

Note: All initial setup and orientation steps should be completed prior to the below sections, which assume at least minor system familiarity.

BUDGETING FOR REVENUE

Note: The most direct method of entry will be used for this section. Additional navigations can be utilized to get to the same form, including right-clicking from the Budget Overview section.

To budget all revenues, select the **Budget OpEx and Revenue** icon.



If not selected already, choose the Program Revenue tab.

At this step, all history and current data driven intersections will appears for the selected Fund/Department combination:

All Budget Expenses | Program Revenue | All Budget Expenses (Unsuppressed) | Program Revenue (Unsuppressed)

Planner: Program Revenue by Department and Fund 0

Fund Department 0020-BUDGET_ADMIN&_OPEROFFICE					
		Actual	Revised Budget	Revised Budget	Original Budget
		Fin	al	Final	Working
		FY 18	3-19	FY 19-20	FY 19-20
		YearTotal	YearTotal	YearTotal	
1102-Next Spring	501001-State University Tuition Fee				1,200
	501802-Transcripts				2,400

If a different Fund/Department combination is needed, use the member selection to change one or both. Reminder: Reference the *Member Selection* section as a guide in making member selections. Make all necessary changes and ensure to select "*Save*" prior to leaving the form.

If an intersection does not yet exist, either:

- 1. Right-click on the selected Fund/Department/Program (if exists) and select "Add New Revenue Lines" OR
- 2. Select the "Program Revenue (Unsuppressed)" option

Both options will lead to the same form. To navigate back to the suppressed form, either use the breadcrumbs from Step #1 or select back on the original form if Step #2 is used.

BUDGETING FOR SALARIES

The following table displays the scope of each account. For Single Incumbent detail, the "Budget Compensation" icon will be used. For both Pools and GL Summarized, the "Budget Other Compensation" icon will be used.

Compensation Detail	Accounts	Additional Calculations
Single Incumbent Positions	601030-President	• GSI
	601100-Academic Salary	New Requests
	601101-Department Chair	 Vacant vs Filled
	601201-Mpp/Supervisory	• FTE
	601300-Support Staff Salary	Benefits
		Taxes
Pooled Positions (No Employee)	601103-Graduate Assistant	• FTE
	601302-Temporary Help	Benefits
	601303-Student Assistant	Taxes
	 601304-Teaching Associates 	
	 601806-Part Time Faculty 	
	601809-Extension Faculty	
	601810-Summer Session Fac	
	601804-Winter Session Fac	
	602001- Gf Workstudy On Camp	
GL Summarized (No	All other accounts excluded	Taxes
Position/Employee/Job Code)	from above that fall under the	
	"Salary & Wages" subtotal	

MODIFY EXISTING ROSTER DETAILS

SALARY AND OTHER INFORMATIONAL CHANGES

Note: The most direct method of entry will be used for this section. Additional navigations can be utilized to get to the same form, including right-clicking from the Budget Overview section.

To modify salaries and other informational changes associated with the roster, navigate to the "**Budget Compensation**" icon.





Select the first vertical tab: igsqcup

Any of the three forms can be used for roster modifications: Department Roster, Department Roster by User Variable, and Department Roster by Job Code.

The following modifications can be made:

- Salary Adjustments (affects Total Salary)
- Merit Amount (affects Total Salary)
- Confirmed (informational only; requires specific access)
- Grade (informational only)
- Step/Range (informational only)
- Hire Date (informational only)
- Comment Field (informational only)

Modify details as-needed and select "*Save*" after each batch of updates. If salaries are modified, ensure that funding is properly handled.

Note: Funding within the same department will be updated on-save. If funding exists in a department(s) outside of the owning department, it will NOT be automatically updated on new salary submission. The 30-minute scheduled process (7AM-11PM PST) will complete all split funding circumstances.

In the example below, a 10,000-salary adjustment increase was entered. The Total Salary field has not been updated yet.
Department Roster | Department Roster by User Variable | Department Roster by Job Code | Salary Adjustments

Planner: Department Roster

Years Scenario Department FY19 Bud 6020-BUDGET_ADMIN_&_OPER_OFFICE													
					Base Salary	GSI	Salary Adjustments	Merit Amount	Confirmed	Total Salary			
				YearTotal	YearTotal	YearTotal	BegBalance	BegBalance	BegBalance	YearTotal	в		
Last Name, F	irst - 000000853	Admin Analyst/SpcIst 12 Mo:00003443	1038 - Admin Analyst/SpcIst 12 Mo	1.00	50,000	0	10,000			50,000	GF		
Last Name, F	irst - 000000887	Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	1.00	50,000	0				50,000	GF		
Last Name, F	irst - 000002158	Budget Analyst:00003555	5287 - Budget Analyst	1.00	50,000	0				50,000	GR		

After "*Save*" is selected, a rule is executed and displays that it has completed. Additionally, three things happen:

- Salary Adjustment number is saved
- The "Confirmed" field shows as orange to signal that confirmation is needed to accept the salary adjustment
- Total Salary is updated with the new number

Position FTE	Base Salary	GSI	Salary Adjustments	Merit Amount	Confirmed	Total Salary	Grade	S
YearTotal	YearTotal	YearTotal	BegBalance	BegBalance	BegBalance	YearTotal	BegBalance	В
1.00	50,000	0	10,000			60,000	GR_1	ST

VACATE AN EXISTING POSITION

Note: The most direct method of entry will be used for this section. Additional navigations can be utilized to get to the same form, including right-clicking from the Budget Overview section.

To access the position roster, navigate to the "Budget Compensation" icon.



Select the first vertical tab:



Any of the three forms can be used for roster modifications: Department Roster, Department Roster by User Variable, and Department Roster by Job Code.

Right-click on a desired position member. Within the menu, select "Manage Position..."->"Vacate Position".



A warning box will appear to confirm that the vacancy should occur. Select "OK" to continue or "Cancel" to exist.



Confirm that the position and employee selections are the desired members. Note: These will match the Employee/Position appointment that was right-clicked.

Select "Launch".

A message will appear to say that the rule was successful. If it was not, check the "Jobs" section.

Information
 WPLN: Planner - Vacate Position was successful.
 OK

All data, inclusive of funding, will be moved. In this case, all data was moved from the selected employee of "Last Name, First – 000000853" to Vacant. The data for the existing employee has been cleared, and a Vacant line now shows on the roster.

Note: If salary needs to be changed, use the Salary Adjustment column.

Department Roster | Department Roster by User Variable | Department Roster by Job Code | Salary Adjustments

Planner: Department Roster

Years FY19	Scenario Bud	Department 6020-BUDGET_ADMIN&_OPEROFFIC	Œ					
				Position FTE	Base Salary	GSI	Salary Adjustments	Merit
				YearTotal	YearTotal	YearTotal	BegBalance	BegE
Last Name, Fi	irst - 000000887	Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	1.00	50,000	0		
Last Name, Fi	irst - 000002158	Budget Analyst:00003555	5287 - Budget Analyst	1.00	50,000	0		
Last Name, Fi	irst - 000003083	Administrator I:00002888	3318 - Administrator I	1.00	50,000	0		
Last Name, Fi	irst - 000003976	Cnfdntl Admin Support 12 Mo:00003974	1176 - Cnfdntl Admin Support 12 Mo	1.00	50,000	0		
Last Name, Fi	irst - 000005606	Administrator lii:00003534	3306 - Administrator III	1.00	50,000	0		
Last Name, Fi	irst - 000006154	Administrator I:00005036	3318 - Administrator I	1.00	50,000	0		
Last Name, Fi	irst - 000006790	Admin Analyst/SpcIst 12 Mo:00008941	1038 - Admin Analyst/SpcIst 12 Mo	1.00	50,000	0		
Last Name, Fi	irst - 000006811	Sr Budget Analyst:00006344	5284 - Sr Budget Analyst	1.00	50,000	0		
Vacant		Admin Analyst/SpcIst 12 Mo:00003443	1038 - Admin Analyst/Spclst 12 Mo	1.00	50,000			
Reviewed Pos	sitions							
Requested Po	ositions							

FILL AN EXISTING POSITION

Note: The most direct method of entry will be used for this section. Additional navigations can be utilized to get to the same form, including right-clicking from the Budget Overview section.

To access the position roster, navigate to the "Budget Compensation" icon.





Any of the three forms can be used for roster modifications: Department Roster, Department Roster by User Variable, and Department Roster by Job Code.

Right-click on a desired vacant position member. Within the menu, select "Manage Position..."->"Fill Position".

	Departmer	nt Roster De	partment Roster by User Variab		· · · · · · · · · · · · · · · · ·	Adjustments					
	Plann	er: Depai	tment Roster 0		Funding Navigation	•					
Ā	Years	Scenario	Department		Roster Navigation	+					
6	FY19	Bud	6020-BUDGET_ADMIN&_OPE		Manage Position	•	🕼 Vacate Po	sition	SI		
					Manage Requests	•	違 Fill Positio	n			
	Last Name	ast Name, First - 000000887 Sr Budget Analyst:00002946			Edit	•	🔂 Add Emplo	oyee Assignme	nt rTo		
	Last Name,	First - 00000215	Budget Analyst:00003555		Adjust	۰	1.00	50,000			
	Last Name,	First - 00000308	3 Administrator I:00002888	+ ≞	Supporting Detail		1.00	50,000			
	Last Name,	First - 00000397	6 Cnfdntl Admin Support 12 Mo:00	_	e apper ang beraan		1.00	50,000			
	Last Name,	First - 00000560	6 Administrator Iii:00003534	(C)	Change History		1.00	50,000			
	Last Name,	First - 00000615	4 Administrator I:00005036	Â	Lock/Unlock Cells		1.00	50,000			

A warning box will appear to confirm that the vacancy should occur. Select "OK" to continue or "Cancel" to exist.



Confirm that the position selection is correct. Use member selection to choose the employee that will be filling the position. Note: The position should be automatically populated based on the right-click selection.

Note: "Last Name, First – 000000853" has been selected as the target employee in this case.

Select "Launch".

A message will appear to say that the rule was successful. If it was not, check the "Jobs" section.



All data is copied from the vacant position to the filled position under Last Name, First – 000000853. Note: If salary needs to be changed, use the Salary Adjustment column.

Planr	ier: Depa	rtment Roster 0			
Years FY19	Scenario Bud	Department 6020-BUDGET_ADMIN&_OPEROFFI	CE		
				Position FTE	Base Salary
				YearTotal	YearTotal
Last Name	e, First - 0000008	53 Admin Analyst/Spclst 12 Mo:00003443	1038 - Admin Analyst/Spclst 12 Mo	1.00	50,0
Last Name	e, First - 0000008	87 Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	1.00	50,0
Last Nam	e, First - 0000021	58 Budget Analyst:00003555	5287 - Budget Analyst	1.00	50,0
Last Name	e, First - 0000030	83 Administrator I:00002888	3318 - Administrator I	1.00	50,0
Last Name	e, First - 0000039	76 Cnfdntl Admin Support 12 Mo:00003974	1176 - Cnfdntl Admin Support 12 Mo	1.00	50,0
Last Nam	e, First - 0000056	06 Administrator lii:00003534	3306 - Administrator III	1.00	50,0
Last Name	e, First - 0000061	54 Administrator I:00005036	3318 - Administrator I	1.00	50,0
Last Name	e, First - 0000067	90 Admin Analyst/SpcIst 12 Mo:00008941	1038 - Admin Analyst/Spclst 12 Mo	1.00	50,0
Last Name	e, First - 0000068	11 Sr Budget Analyst:00006344	5284 - Sr Budget Analyst	1.00	50,0
Reviewed	Positions				
Requester	d Positions				

ADD EMPLOYEE TO A POSITION

If a position already exists but will need multiple employee assignments for at least part of a year, this functionality should be utilized.

Note: The most direct method of entry will be used for this section. Additional navigations can be utilized to get to the same form, including right-clicking from the Budget Overview section.

To access the position roster, navigate to the "Budget Compensation" icon.



Any of the three forms can be used for roster modifications: Department Roster, Department Roster by User Variable, and Department Roster by Job Code.

Right-click on a desired position member. Within the menu, select "Manage Position..."->"Add Employee Assignment".

Complete all prompts as-needed:

- Enter DeptID represents the owning department that should be driven by the initial right-click
- Enter Employee represents the new employee to be added to the position
- Enter Position represents the position to be used that should be driven by the initial right-click
- Enter Job Code represents the job code to be used that should be driven by the initial rightclick
- Enter Salary represents the salary of the new assignment to be used
- Enter Funding Department represents the funding department that will pay, if different than the owning department
- Enter Fund represents the fund that will be used to pay the appointment

	WPLN: Planner - A	e Nõ	Launch Cancel		
3 8 8	* Enter DeptID: * Enter Employee: * Enter Position: * Enter Job Code:	"DP_6020" EM_100000000 "PS_00003443" "JC_1038"	* Enter salary (based on FTE) for new position: * Enter Funding Department: * Enter Fund:	50000 "DP_6020" FD_NG001	0,
1 7					

After the rule completes, both assignments should now exist. In the screenshot below, the assignments exist as the first and last rows. This is due to the fact that the form is sorted by employee rather than position.

Years FY19	Scenario Bud	Department 6020-BUDGET_ADMIN&_OPEROFFIC	CE			
				Position FTE	Base Salary	(
				YearTotal	YearTotal	Yea
Last Name, F	irst - 00000085	3 Admin Analyst/SpcIst 12 Mo:00003443	1038 - Admin Analyst/Spclst 12 Mo	1.00	50,000	
Last Name, F	first - 00000088	7 Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	1.00	50,000	
Last Name, F	First - 00000215	8 Budget Analyst:00003555	5287 - Budget Analyst	1.00	50,000	
Last Name, F	First - 00000308	3 Administrator I:00002888	3318 - Administrator I	1.00	50,000	
Last Name, F	First - 00000397	6 Cnfdntl Admin Support 12 Mo:00003974	1176 - Cnfdntl Admin Support 12 Mo	1.00	50,000	
Last Name, F	irst - 00000560	6 Administrator Iii:00003534	3306 - Administrator III	1.00	50,000	
Last Name, F	First - 000006154	4 Administrator I:00005036	3318 - Administrator I	1.00	50,000	
Last Name, F	irst - 00000679	0 Admin Analyst/SpcIst 12 Mo:00008941	1038 - Admin Analyst/Spclst 12 Mo	1.00	50,000	
Last Name, F	First - 00000681	1 Sr Budget Analyst:00006344	5284 - Sr Budget Analyst	1.00	50,000	
Test Employe	e: 10000000	Admin Analyst/SpcIst 12 Mo:00003443	1038 - Admin Analyst/Spclst 12 Mo	1.00	50,000	

Should both or one of the employee assignments require only a partial year, the funding option should be utilized. Right-click on the position with multiple assignments and select "Funding Navigation..."->"Funding by Position". More details on funding modifications can be found in ensuing sections.

REMOVE EMPLOYEE FROM POSITION AND/OR MODIFY MONTHLY ASSIGNMENTS

Should there be a situation that requires an employee to be removed from a position without being vacated, the funding option will be utilized.

Note: The employee appointment will still show on the roster with the initial salary for historical reasons. To note the removal of the employee, use the commentary field on the roster.

To access the position roster, navigate to the "Budget Compensation" icon.

TI.



Select the first vertical tab:

Any of the three forms can be used for roster modifications: Department Roster, Department Roster by User Variable, and Department Roster by Job Code.

Right-click on either the employee or position member. Select "Funding Navigation...". If using the employee, then select "Funding by Employee". If using position, select "Funding by Position". In the example below, the employee was used.

₩	Department Roster		A	- ne	ent Roster by Job Code Sala	ry
	Planner: Dep		Funding Navigation	•	🔒 Funding by Employee	
	Years Scenario		Roster Navigation	• 0	B Funding by Position	
6	FY19 Bud		Manage Position		Funding by Department	F
			Manage Requests	١		
	Last Name, First - 00000		Edit	► 38	- Admin Analyst/Spclst 12 Mo	
	Last Name, First - 00000		Adjust	• 84	I - Sr Budget Analyst	
	Last Name, First - 00000	+=	Supporting Detail	87	' - Budget Analyst	
	Last Name, First - 00000	-	Supporting Detail	18	3 - Administrator I	
	Last Name, First - 00000	0	Change History	76	- Cnfdntl Admin Support 12 Mo	
	Last Name, First - 00000		Lock/Unlock Cells	06	6 - Administrator III	
	Last Name, First - 00000			18	- Administrator I	
	Last Name, First - 00000		Filter	▶ 38	- Admin Analyst/SpcIst 12 Mo	
	Last Name, First - 00000		Sort	▶ 84	I - Sr Budget Analyst	
	Test Employee: 1000000	-		38	- Admin Analyst/SpcIst 12 Mo	
	Reviewed Positions	*>	Analyze			
	Requested Positions		New Ad Hoc Grid			

All funding associated with the employee will show, including the ability to see both an annual view and monthly.

Department Roster Department Roster by User Variable Department Roster by Job Code Salary Adjustments														
Planne	r: Fund	ing by Employe	e 🚯								₩Ę.	Actions		Refre
Planner: Department Roster > Planner: Funding by Employee														
Years FY19	Scenario Bud	Employee Test Employee: 10000000							/	¢	Data	Ad hoc	Form	
												Fundir	ng %	
						Jul	Aug	Sep	Oct	Nov		Dec	Jan	
Working	Admin An	alyst/Spcist 12 Mo:00003443	1038 - Admin Analyst/Spclst 12 Mo	6020-BUDGET_ADMIN&_OPEROFFICE	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	1.00	1.00		1.00	1.00	1.00	J

Delete all months that should no longer be used. If deleting for the full year, delete the full data set out of YearTotal. In this case, all months are removed to prevent any funding from happening for the selected employee. Select "Save".

Note: Delete by highlighting one or multiple cells and selecting the "Delete" key. Do NOT hit the Backspace key.

All funding has now been deleted, removing the assignment from funding.

Departme Planr	ent Roster D Ner: Fund	Department Roster by User V ding by Employe	riable De	partment Roste	er by Job Code	Salary Adjustm	ents		
Planner: I	Department Ro	oster > Planner: Funding by	mployee						
Years FY19	Scenario Bud	Employee Test Employee: 10000000							
					Jul	Aug	Sep	Oct	
There are	no valid rows o	of data for this form.							

Breadcrumbs can then be used to navigate back to Planner: Department Roster.

Planner: Department Roster > Planner: Funding by Employee

Years	Scenario	Employee	
FY19	Bud	Test Employee: 10000000	

Enter and submit a comment notifying the specific assignment that was deleted for future reference.

Department Planne	Roster Dep er: Depar	artment Roster by User Variable Dep. tment Roster ③	artment Roster by Job Code Sala	ary Adjustments			_							B	Actions - Save	<u>R</u> efi
Years FY19	Scenario Bud	Department 6020-BUDGET_ADMIN&_OPEROFFIC	E											¢ .	ata Ad hoc	Forn
				Position FTE	Base Salary	GSI	Salary Adjustments	Merit Amount	Confirmed	Total Salary	Grade	Step/Rang	le	Hire Date	Comment Field	
				YearTotal	YearTotal	YearTotal	BegBalance	BegBalance	BegBalance	YearTotal	BegBalance	BegBaland	e	BegBalance	BegBalance	
Last Name, F	First - 000000853	Admin Analyst/SpcIst 12 Mo:00003443	1038 - Admin Analyst/SpcIst 12 Mo	1.00	50,000	0				50,000	GR_1	ST_0				
Last Name, F	First - 000000887	Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	1.00	50,000	0				50,000	GR_1	ST_0				
Last Name, F	First - 000002158	Budget Analyst:00003555	5287 - Budget Analyst	1.00	50,000	0				50,000	GR_1	ST_0				
Last Name, F	First - 000003083	Administrator I:00002888	3318 - Administrator I	1.00	50,000	0				50,000	GR_1	ST_0				
Last Name, F	First - 000003976	Cnfdntl Admin Support 12 Mo:00003974	1176 - Cnfdntl Admin Support 12 Mo	1.00	50,000	0				50,000	GR_1	ST_0				
Last Name, F	First - 000005606	Administrator III:00003534	3306 - Administrator III	1.00	50,000	0				50,000	GR_1	ST_0				
Last Name, F	First - 000006154	Administrator I:00005036	3318 - Administrator I	1.00	50,000	0				50,000	GR_1	ST_0				
Last Name, F	First - 000006790	Admin Analyst/Spcist 12 Mo:00008941	1038 - Admin Analyst/Spcist 12 Mo	1.00	50,000	0				50,000	GR_1	ST_0				
Last Name, F	First - 000006811	Sr Budget Analyst:00006344	5284 - Sr Budget Analyst	1.00	50,000	0				50,000	GR_1	ST_0				
Test Employe	e: 10000000	Admin Analyst/Spclst 12 Mo:00003443	1038 - Admin Analyst/Spcist 12 Mo	1.00	50,000					50,000					Employee removed	
Reviewed Po	sitions															

MODIFY POSITION FUNDING

Any of the forms on the Funding tab can be used to modify funding, and the results will appear in each. Additionally, roster forms can be utilized with right-click navigations as well. In the examples below, the Department Funding form has been used.

MODIFY EXISTING FUNDING (INCLUDING REMOVAL)

To access funding, navigate to the "*Budget Compensation*" icon.





Select the second vertical tab:

Select the "Department Funding" tab if it is not already selected and ensure the proper department member is selected.

Department Funding | Employee Funding | Position Funding

Reviewed

Positions

Years FY19	Scenario Bud	Department 6020-BUDGET_AD	MIN&_OPEROFFICE					
						Funding %	Avg Funding %	Distributed Salary
						* YearTotal	YearTotal	YearTotal
Working	Last Name	e, First - 000000853	Admin Analyst/SpcIst 12 Mo:00003443	1038 - Admin Analyst/Spclst 12 Mo	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000000887	Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	NG001-GENERAL SUPPORT & STUDENT FEES	0.50	0.50	25,000
					NR301-COST RECOVERY	0.50	0.50	25,000
	Last Name	e, First - 000002158	Budget Analyst:00003555	5287 - Budget Analyst	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000003083	Administrator I:00002888	3318 - Administrator I	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000003976	Cnfdntl Admin Support 12 Mo:00003974	1176 - Cnfdntl Admin Support 12 Mo	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000005606	Administrator III:00003534	3306 - Administrator III	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000006154	Administrator I:00005036	3318 - Administrator I	NG001-GENERAL SUPPORT & STUDENT FEES	0.40	0.40	20,000
	Last Name	e, First - 000006790	Admin Analyst/SpcIst 12 Mo:00008941	1038 - Admin Analyst/Spclst 12 Mo	NR301-COST RECOVERY	1.00	1.00	50,000
	Last Name	e, First - 000006811	Sr Budget Analyst:00006344	5284 - Sr Budget Analyst	NR301-COST RECOVERY	1.00	1.00	50,000
Reviewed	Positions							
Requested	Positions							

To make an update, either enter the full change into the cell showing by default OR expand out YearTotal to enter more detailed numbers. In the example below, a 50/50 funding has been modified to be 75/25 for the full year. Ensure that proper decimals are used when necessary.

Department Funding | Employee Funding | Position Funding Planner: Department Funding 0 Scenario Bud Years FY19 6020-BUDGET_ADMIN._&_OPER._OFFICE Avg Funding Distributed Funding % % Salary YearTotal YearTotal YearTotal 1.00 Working Last Name, First - 000000853 Admin Analyst/Spclst 12 Mo:00003443 1038 - Admin Analyst/Spclst 12 Mo NG001-GENERAL SUPPORT & STUDENT FEES 1.00 50,000 75 Last Name, First - 000000887 Sr Budget Analyst:00002946 5284 - Sr Budget Analyst NG001-GENERAL SUPPORT & STUDENT FEES 0.50 25 000 NR301-COST RECOVERY .25 0.50 25,000 5287 - Budget Analyst Last Name, First - 000002158 Budget Analyst:00003555 NG001-GENERAL SUPPORT & STUDENT FEES 1.00 1.00 50.000 Last Name, First - 00003083 Administrator I:00002888 3318 - Administrator I NG001-GENERAL SUPPORT & STUDENT FEES 1.00 1.00 50,000 Last Name, First - 000003976 Cnfdntl Admin Support 12 Mo:00003974 1176 - Cnfdntl Admin Support 12 Mo NG001-GENERAL SUPPORT & STUDENT FEES 1.00 1.00 50,000 Last Name, First - 000005606 Administrator Iii:00003534 3306 - Administrator III NG001-GENERAL SUPPORT & STUDENT FEES 1.00 1.00 50,000 3318 - Administrator I Last Name, First - 000006154 Administrator I:00005036 NG001-GENERAL SUPPORT & STUDENT FEES 0.40 20.000 0.40 Last Name, First - 000006790 Admin Analyst/Spclst 12 Mo:00008941 1038 - Admin Analyst/Spclst 12 Mo NR301-COST RECOVERY 1.00 1.00 50,000 Last Name, First - 000006811 Sr Budget Analyst:00006344 5284 - Sr Budget Analyst NR301-COST RECOVERY 1.00 1.00 50.000

After submitting the data, the Distributed Salary and Avg Funding % are updated based on the new numbers.

Department Funding | Employee Funding | Position Funding Planner: Department Funding ()

Years FY19	Scenario Bud	Department 6020-BUDGET_AD	DMIN&_OPEROFFICE					
						Funding %	Avg Funding %	Distributed Salary
						* YearTotal	YearTotal	YearTotal
Working	Last Nam	e, First - 000000853	Admin Analyst/SpcIst 12 Mo:00003443	1038 - Admin Analyst/SpcIst 12 Mo	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000000887	Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	NG001-GENERAL SUPPORT & STUDENT FEES	0.75	0.75	37,500
					NR301-COST RECOVERY	0.25	0.25	12,500
	Last Name	e, First - 000002158	Budget Analyst:00003555	5287 - Budget Analyst	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000003083	Administrator I:00002888	3318 - Administrator I	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000003976	Cnfdntl Admin Support 12 Mo:00003974	1176 - Cnfdntl Admin Support 12 Mo	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000005606	Administrator Iii:00003534	3306 - Administrator III	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Name	e, First - 000006154	Administrator I:00005036	3318 - Administrator I	NG001-GENERAL SUPPORT & STUDENT FEES	0.40	0.40	20,000
	Last Name	e, First - 000006790	Admin Analyst/SpcIst 12 Mo:00008941	1038 - Admin Analyst/SpcIst 12 Mo	NR301-COST RECOVERY	1.00	1.00	50,000
	Last Name	e, First - 000006811	Sr Budget Analyst:00006344	5284 - Sr Budget Analyst	NR301-COST RECOVERY	1.00	1.00	50,000
Reviewed	Positions							

ADD NEW FUNDING

To access funding, navigate to the "Budget Compensation" icon.

X



Select the second vertical tab:

Select the "Department Funding" tab if it is not already selected and ensure the proper department member is selected.

Department Funding | Employee Funding | Position Funding Planner: Department Funding ()

Years FY19	Scenario Bud	Department 6020-BUDGET_AI	DMIN&_OPEROFFICE					
						Funding %	Avg Funding %	Distributed Salary
						YearTotal	YearTotal	YearTotal
Working	Last Nam	e, First - 000000853	Admin Analyst/SpcIst 12 Mo:00003443	1038 - Admin Analyst/Spclst 12 Mo	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Nam	e, First - 000000887	Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	NG001-GENERAL SUPPORT & STUDENT FEES	0.75	0.75	37,500
					NR301-COST RECOVERY	0.25	0.25	12,500
	Last Nam	e, First - 000002158	Budget Analyst:00003555	5287 - Budget Analyst	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Nam	e, First - 000003083	Administrator I:00002888	3318 - Administrator I	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Nam	e, First - 000003976	Cnfdntl Admin Support 12 Mo:00003974	1176 - Cnfdntl Admin Support 12 Mo	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Nam	e, First - 000005606	Administrator Iii:00003534	3306 - Administrator III	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000
	Last Nam	e, First - 000006154	Administrator I:00005036	3318 - Administrator I	NG001-GENERAL SUPPORT & STUDENT FEES	0.40	0.40	20,000
	Last Nam	e, First - 000006790	Admin Analyst/SpcIst 12 Mo:00008941	1038 - Admin Analyst/Spclst 12 Mo	NR301-COST RECOVERY	1.00	1.00	50,000
	Last Nam	e, First - 000006811	Sr Budget Analyst:00006344	5284 - Sr Budget Analyst	NR301-COST RECOVERY	1.00	1.00	50,000
Poviewood	Positions							

For a new funding line, right-click on the fund of the line that the new funding line is to be based off. In this example, a new Cost Recovery line will be added to the first funding line on the screen. Select "Manage Funding..."->"Add Funding".



Complete each prompt as needed. In this case, all of the prompts will be the left as-is from the initial right-click with the exception of Fund. Fund is set to the NR301 fund through the user of member selection.

Note: If the right-click was made on the incorrect intersection, it will likely be easier to cancel out of the rule and re-launch with the correct intersection selected.

* Enter Fund:	"FD_NR301"	

Select "Launch". The new line is added with a 0.

						,	
				YearTotal	YearTotal	YearTotal	
Last Name, First - 000000853	Admin Analyst/SpcIst 12 Mo:00003443	1038 - Admin Analyst/Spclst 12 Mo	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	50,000	
			NR301-COST RECOVERY	0.00	0.00		
Last Name, First - 000000887	Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	NG001-GENERAL SUPPORT & STUDENT FEES	0.75	0.75	37,500	

To complete the process, modify the funding to make the total equal to 1.00 / 100%. Select "Save".

	Funding %	Avg Funding %	Distributed Salary
		YearTotal	YearTotal
s	.50	1.00	50,000
	.50	0.00	
s	0.75	0.75	37,500

Following submission, the data is now showing as fully updated with a 50/50 split funding.

Department Funding | Employee Funding | Position Funding Planner: Department Funding I Verians Bud Department for the contract of the contra

MANAGE POSITION REQUESTS

Last Name, First - 000000887 Sr Budget Analyst:00002946

The request process below identifies how to add new position requests. Examples of required position requests would be net new positions and job code reclassifications.

5284 - Sr Budget Analyst

Note: Vacating and/or modifying employee assignments do NOT require new position request. These can be done as part of the existing position process.

Avg Funding

%

YearTotal

0.50

0.50

0.75

NG001-GENERAL SUPPORT & STUDENT FEES

0.50

0.50

0.75

Distributed

Salary

YearTotal

25,000

25.000

37,500

Once added, there will be additional steps required by users with additional access to ultimately move the position into the working budget.

REQUEST NEW POSITION

To access the position roster, navigate to the "Budget Compensation" icon.



Requests can be made in either the roster forms (tab 1) or the request forms (tab 3). For this example, the first option of roster will be used. This will be the recommended option since there are other positions setups that can be leveraged to help guide the right-click prompts.

For the example below, the Department Roster has been selected.

Right-click anywhere on the existing form to add a new request. If there are any existing members that can be utilized, such as Position and Job Code, ensure they are part of the right-click. In the example below, a net new Administrator position will be added.

Within the right-click menu, select "Manage Requests..."->"Add New Request". Based on the type of request, select one of "Add New Position" or "Add Existing Position". For our net new example, the "Add New Position" will be used since the position has not been added to HR. For an example like a job code reclassification, the "Add Existing Position" option would be used since the position already exists but is being reclassified to a different job code.

able Dep	anment Roster by .		▲				
			Funding Navigation				
			Roster Navigation	•			
PEROFFIC	CE		Manage Position	•	OPI Palani	Marit Amount	Confirmed
			Manage Requests	۰ľ	Add New Request	Add New F	Position
0003443	1038 - Admin Analys		Edit	•	😼 Delete Request	<table-cell> Add Existir</table-cell>	ng Position
	5284 - Sr Budget An		Adjust	•	Approve Request	_	
	5287 - Budget Analy	*1	Supporting Detail		Set Request to Reviewed		
	3318 - Administrator			Ļ			
o:00003974	1176 - Cnfdntl Admir	C	Change History		0		
	3306 - Administrator		Lock/Unlock Cells		0		
	3318 - Administrator				0		
00008941	1038 - Admin Analys		Filter		0		
	5284 - Sr Budget An		Sort		0		
0003443	1038 - Admin Analys	-	Analyze				
			Analyze	1			
		4	New Ad Hoc Grid	1			
			Show Reasons for Read-Only Cells				

Complete the prompts as-needed. For an Existing Position, there will be an additional field to choose the necessary position. If the right-click was made on the desired position, it should show in the prompt field automatically.

Complete all prompts as-needed:

- Enter DeptID represents the owning department of the position
- Enter Employee represents the employee to be added to the position
- Enter Position (*only in Existing*) represents the position to be used
- Enter Job Code represents the job code to be used
- Enter Position FTE represents the FTE of the full position
- Enter Salary represents the salary of the new assignment to be used
- Enter Funding Department represents the department that will pay the new position
- Enter Fund represents the fund that will pay the new position

WPLN: Planner - R	₽ N ô	Launch Cancel			
* Enter DeptID:	"DP_6020"] 7	* Enter salary (based on FTE) for new position:	50000	
* Enter Employee:	EM_10000000		* Enter Funding Department:	"DP_6020"	7 ₇
* Enter Job Code:	"JC_3318"		* Enter Fund:	FD_NG001	
* Enter Position FTE (distributions will be added later)	1]			

After launching the business rule, the new position request will be added. If the "New Position" option was used, a generic identifier will show up. In the example below, "New Single Incumbent 10" was added under the "Requested Positions" section. If the "Existing Position" option is used, the chosen position would show along with the full assignment under "Requested Positions".

^{Years} FY19	Scenario Bud	Department 6020-BUDGET_ADMIN&_OPEROFFIC	CE					
				Position FTE	Base Salary	GSI	Salary Adjustments	Merit Amo
				YearTotal	YearTotal	YearTotal	BegBalance	BegBalan
Last Name,	First - 000000853	Admin Analyst/Spclst 12 Mo:00003443	1038 - Admin Analyst/Spclst 12 Mo	1.00	50,000	0		
Last Name,	First - 000000887	Sr Budget Analyst:00002946	5284 - Sr Budget Analyst	1.00	50,000	0		
Last Name,	First - 000002158	Budget Analyst:00003555	5287 - Budget Analyst	1.00	50,000	0		
Last Name,	First - 000003083	Administrator I:00002888	3318 - Administrator I	1.00	50,000	0		
Last Name,	First - 000003976	Cnfdntl Admin Support 12 Mo:00003974	1176 - Cnfdntl Admin Support 12 Mo	1.00	50,000	0		
Last Name,	First - 000005606	Administrator lii:00003534	3306 - Administrator III	1.00	50,000	0		
Last Name,	First - 000006154	Administrator I:00005036	3318 - Administrator I	1.00	50,000	0		
Last Name,	First - 000006790	Admin Analyst/Spclst 12 Mo:00008941	1038 - Admin Analyst/Spclst 12 Mo	1.00	50,000	0		
Last Name,	First - 000006811	Sr Budget Analyst:00006344	5284 - Sr Budget Analyst	1.00	50,000	0		
Test Employ	ee: 10000000	Admin Analyst/Spclst 12 Mo:00003443	1038 - Admin Analyst/SpcIst 12 Mo	1.00	50,000			
Reviewed P	ositions							
Requested F	Positions							
Test Employ	ee: 10000000	New Single Incumbent 10	3318 - Administrator I	1.00	50,000			

If no further data entry needs to occur, the request is now complete (note: a comment within the comment field is heavily suggested). For further funding, use the right-click navigation to "Funding Navigation..."->"Funding by..." to further add/modify funding the request.

In the example below, a right-click to Position Funding has been selected off of the New Single Incumbent 10 position. Further funding can then be added as-needed to this form prior to the request being approved.

Department Roster | Department Roster by User Variable | Department Roster by Job Code | Salary Adjustments

Planner: Funding by Position

Planner: Department Roster > Planner: Funding by Position

Years FY19	Scenario Bud	Position New Single Incumber	nt 10				
					Funding %	Distributed Salary	
					* YearTotal	YearTotal	
Test Employe	e: 10000000	3318 - Administrator I	6020-BUDGET_ADMIN&_OPEROFFICE	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	50,000	
				Total	1.00	50,000	

DELETE NEW POSITION REQUEST

Note: Requests that are still pending can be deleted by the originator. However, they cannot be removed once set to reviewed and/or approved. At that point, only users with the proper access can remove.

To access the position roster, navigate to the "Budget Compensation" icon.



F

Select the third vertical tab:

Requests can be made in either the roster forms (tab 1) or the request forms (tab 3). For this example, the third option of request forms will be used. This will be the recommended option since it focuses specifically on the requests at each stage.

This form will utilize the VarDepartment user variable to allow for the ability to see all requests under any level of the department hierarchy.

Plann	er: Red	quests - In	Proc	ess 🛛					
ears Y19	Scenario Bud	Version Requested	VarDepar Adminis	tment tration & Finance					
318 - Adr	ninistrator I	New Single Incumb	ent 10	6020-BUDGET_A	DMIN&_OPEROFFICE	Test Employee: 10000000	No Fund	Total Salary	50,00
STO - Administrator T					Position FTE	1.0			
					NG001-GENERAL SUPPORT & STUDENT FEES	Position FTE	0.5		
						Distributed FTE	0.		
								Funding %	0.
					NR301-COST RECOVERY	Position FTE	0.		
				Dist	Distributed FTE	0.			
								Funding %	0

To delete a request, right-click on the desired position. Go to "Manage Requests..."->"Delete Request".

V M	Current Re	quests ∣ or: Ro	Reviewed Ap		۵.		<u> </u>
×	Fiame	71. IXO	quests - I		Manage Requests	,	Add New Request
	Years	Scenario	Version		Funding Navigation		😼 Delete Request
÷ð	1113	Bud	Requested		Roster Navigation	•	D Approve Request
	3318 - Admi	3318 - Administrator I New Single Incur		r	Edit	+	😨 Set Request to Reviewed
					Adjust	•	NG00
				14	Supporting Detail		
				6	Change History		NECO
				ê	Lock/Unlock Cells		NR30
					Filter	•	

Confirm deletion and select "OK".



Confirm that the selections are as-expected, and execute the rule. Following completion, the request will be gone from both this screen and all others (roster and funding).

					Co
1	Current F Planr	Requests Re Ner: Requ	viewed Appro Jests - In	Process (1)	
	Years FY19	Scenario Bud	Version Requested	VarDepartment Administration & Finance	
TŬ	There are	no valid rows o	f data for this fo	rm.	YearTotal

VIEW/MODIFY EXISTING REQUESTS

To modify or view requests beyond adding/deleting, navigate to the request process:

Navigate to the "Budget Compensation" icon.



From this area, utilize the three tabs as-needed to either modify or view where each request is at within the process. Additionally, right-click navigation to both funding and roster forms will also be available to simplify any modification process required.

MODIFY POOLED COMPENSATION

MODIFYING EXISTING POOLS

To access pool funding, navigate to the "Budget Other Compensation" icon.



Use the "Pools" or "Pools by Department Variable" form. In the example below, the "Pools" form has been used:

Pools Pools by D Planner: Po	epartment Variable N OOIS 🚯	atural Account Compensation Natural Accou	int Compensation ((Unsuppressed)									
Employee D Default Employee 6	Employee Department Default Employee 6020-BUDGET_ADMIN_&_OPER_OFFICE												
				Act							Bud		
				FY19							FY19		
				YearTotal	YearTotal	1-July	2-August	3-September	4-October	5-November	6-December	7-Ja	
1870 - Student Asst	Student Asst:00006746	NG001-GENERAL SUPPORT & STUDENT FEES	Distributed FTE		5.00	5.00	5.00	5.00	5.00	5.00	5.00		
			Distributed Salary		120,000	10,000	10,000	10,000	10,000	10,000	10,000		

Make modifications to existing FTE and Salary as needed. Unlike position setups, the pooled compensation will be entered directly. Both Distributed FTE and Salary should be entered as it would be expected to be incurred by month. For example, summer assistance would only be expected to occur in the summer months.

Additionally, FTE is a required entry due to its impact on benefits.

For this example, the pool entry shows that there are expected to be five full-time equivalent student assistants that will incur 10,000 dollars each month. Note that these five full-time equivalents may consist of far more than five headcounts, but the FTE is the priority for data entry.

Enter necessary changes and submit data. In the example below, September has been increased to allow for a higher student assistant budget for the first month of the academic year.

Pools Pools by D Planner: Po	>ols Pools by Department Variable Natural Account Compensation (Unsuppressed) Planner: Pools • • •												
Employee D Default Employee 6	yee Department It Employee 6020-BUDGET_ADMIN_&_OPER_OFFICE												
				Act							Bud		
				FY19	FY19					FY19			
				YearTotal	YearTotal	1-July	2-August	3-September	4-October	5-November	6-December		
1870 - Student Asst	Student Asst:00006746	NG001-GENERAL SUPPORT & STUDENT FEES	Distributed FTE		5.00	5.00	5.00	10.00	5.00	5.00	5.00		
			Distributed Salary		120,000	10,000	10,000	20,000	10,000	10,000	10,000		

On submission, data is retained. Additionally, the YearTotal number has increased to 130,000.

Pools | Pools by Department Variable | Natural Account Compensation | Natural Account Compensation (Unsuppressed)
Planner: Pools

Employee D Default Employee 6	Employee Department Default Employee 6020-BUDGET_ADMIN_&_OPER_OFFICE													
				Act										
				FY19										
				YearTotal	YearTotal	1-July	2-August	3-September	4-October	5-Novembe				
1870 - Student Asst	Student Asst:00006746	NG001-GENERAL SUPPORT & STUDENT FEES	Distributed FTE		5.42	5.00	5.00	10.00	5.00					
			Distributed Salary		130,000	10,000	10,000	20,000	10,000	10				

ADDING POOL FUNDING

To access pool funding, navigate to the "Budget Other Compensation" icon.



Use the "Pools" or "Pools by Department Variable" form. In the example below, the "Pools" form has been used:

Pools Pools by E Planner: P	Department Variable N	atural Account Compensation Natural Accou	int Compensation (Unsuppressed)									
Employee Default Employee	Employee Department Default Employee 6020-BUDGET_ADMIN_&_OPER_OFFICE												
				Act							Bud		
				FY19							FY19		
				YearTotal	YearTotal	1-July	2-August	3-September	4-October	5-November	6-December	7-Ja	
1870 - Student Asst	Student Asst:00006746	NG001-GENERAL SUPPORT & STUDENT FEES	Distributed FTE		5.00	5.00	5.00	5.00	5.00	5.00	5.00		
			Distributed Salary		120,000	10,000	10,000	10,000	10,000	10,000	10,000		

Right-click off the form to bring up the option to add additional pool funding. Note: Ensure the rightclick is on a line that can be leveraged to assist with prompt selections.

In the example below, the right-click is off NG001 since the new pool will be a different position within the same job code, department, and fund. Select "Add Pool Funding".

Reals I Boola bu	Department Variable Natural Associate Companyation			
Pools Pools by		P .	Add Deel Euroding	(U)
Planner: I	200IS ()	L <u>S</u>	Add Pool Funding	
Employee	Department		Edit	•
Default Employee	6020-BUDGET_ADMIN&_OPEROFFICE		Adjust	•
		*#	Supporting Detail	
		5 1	Change History	
1870 - Student Ass	Student Asst: 00006746 NG001-GENERAL SUPPORT &	s 1	Lock/Unlock Cells	

Use the member selection to update any necessary field changes. Select "Launch" once complete. In this example, Pool ID 00005383 has been selected.

The pool has now been added with all 0's. The row is now available for modification.

Pools Pools by D	epartment Variable N	atural Account Compensation Natural Accou	Int Compensation (Unsuppressed)						
Planner: Po	ools O									
Employee D Default Employee 6	epartment 020-BUDGET_ADMIN&	_OPER_OFFICE								
				Act						
				FY19						
				YearTotal	YearTotal	1-July	2-August	3-September	4-October	5
1870 - Student Asst	Student Asst:00006746	NG001-GENERAL SUPPORT & STUDENT FEES	Distributed FTE		5.42	5.00	5.00	10.00	5.00	
			Distributed Salary		130,000	10,000	10,000	20,000	10,000	
	Student Asst:00005383	33 NG001-GENERAL SUPPORT & STUDENT FEES	Distributed FTE		0.00	0.00	0.00	0.00	0.00	
			Distributed Salary		0	0	0	0	0	

DELETING POOL FUNDING

To delete pool funding, follow the section "MODIFYING EXISTING POOLS". Rather than changing/adding, use the "delete" key to remove data from all cells. Save the altered data to see the row(s) removed.

Note: If actuals are driving a row, it cannot be deleted.

MODIFY GL COMPENSATION

MODIFY EXISTING GL COMPENSATION

To access GL Compensation funding, navigate to the "Budget Other Compensation" icon.



Use the "Natural Account Compensation" to enter data based on suppressed rows. These rows will show any data that exists within the working budget, actuals, or revised budget. Update the department selection accordingly.

Pools | Pools by Department Variable | Natural Account Compensation | Natural Account Compensation (Unsuppressed)

Department 6020-BUDGET_ADMIN&_OPEROFFICE						
		Act	RvBud	RvBud	Bud	
	FY18		FY19	FY19		
		YearTotal	YearTotal	YearTotal	YearTotal	
NG001-GENERAL SUPPORT & STUDENT FEES	602001-Gf Workstudy On Camp	80,000	20,000	10,000		

Enter into the Bud column via YearTotal or monthly (using the + expansion). After each bulk of entries, submit the data. Data submitted via this form will be updated on the 30-minute (7AM-11PM PST) window.

ADD NEW GL COMPENSATION

To access GL Compensation funding, navigate to the "Budget Other Compensation" icon.



If an intersection does not yet exist, either:

- 1. Right-click on the selected Fund/Account (if exists) and select "Add GL Compensation Lines" OR
- 2. Select the "Natural Account Compensation (Unsuppressed)" option

Both options will lead to the same form. To navigate back to the suppressed form, either use the breadcrumbs from Step #1 or select back on the original form if Step #2 is used.

BUDGETING FOR OPERATING EXPENSES & TRANSFERS

Note: The most direct method of entry will be used for this section. Additional navigations can be utilized to get to the same form, including right-clicking from the Budget Overview section.

To budget all non-compensation expenses in addition to miscellaneous items such as transfers, select the **Budget OpEx and Revenue** icon.



If not selected already, choose the *All Budget Expenses* tab.

At this step, all history and current data driven intersections will appears for the selected Fund/Department combination:

All Budget Expenses | Program Revenue | All Budget Expenses (Unsuppressed) | Program Revenue (Unsuppressed)

und IG001-GENERAL SUPPORT & STUDENT F	Department EES 6020-BUDGE	T_ADMIN&_OP	EROFFICE	
	YearTotal	YearTotal	YearTotal	
	Act	RvBud	Bud	Bud
	Final	Final	Final	Working
	FY 18-19	FY 19-20	FY 19-20	FY 19-20
	All Programs	All Programs	All Programs	No Program
604090-Other Communications	10,000			5,000
□ Communications	10,000			5,000
606001-Travel In State	80,000	10,000		
Travel	80,000	10,000		
613001-Contractual Services		10,000		
Contractual Services		10,000		
616002-I/T Hardware Capital		10,000		
616802-It Hardware Non-Capital	10,000	10,000		
⊟ It Costs	10,000	20,000		
617001-Serv From Other Fund	120,000	10,000		
Services From Other Fnds Agncy	120,000	10,000		

If a different Fund/Department combination is needed, use the member selection to change one or both. Reminder: Reference the *Member Selection* section as a guide in making member selections. Make all necessary changes and ensure to select "*Save*" prior to leaving the form. All data will be consolidated on-save.

If an intersection does not yet exist, either:

- 1. Right-click on the selected Fund/Department (if exists) and select "Add OpEx Lines" OR
- 2. Select the "All Budget Expenses (Unsuppressed)" option

Both options will lead to the same form. To navigate back to the suppressed form, either use the breadcrumbs from Step #1 or select back on the original form if Step #2 is used.

ADDITIONAL INSTRUCTIONS

TRANSFER A POSITION TO A DIFFERENT DEPARTMENT

In order to move a position (and the associated employee) to a different department there are a few steps you will need to follow but to summarize those steps first you will need to:

- 1. Vacate the position in the current dept
- 2. Fill an existing position and change the Dept ID in the dialog box (keeping the position as vacant for now)
- 3. In the dept the the position is transferring to the position will need to be Reviewed and Approved in PBCS to be moved
- 4. You will then fill the position with the employee

The following are the step by step instructions:

In the Department Roster Form select the position you want to move to another department. <u>Write</u> <u>down the Employee ID, Position Number and Salary of the employee before proceeding as you will need</u> <u>that information in future steps.</u> Once you have highlighted the position, right click to "Manage Position" then "Vacate Position"

					۵		/enue Compensation					
Г					Funding Navigation	•						
	Departmen	nt Roster D	epartme		Roster Navigation	•	er by Job Code Salary Adjus	stmer	nts			
T	Plann	er: Depa	artme		Manage Position	,	Vacate Position		1			
ł	Years FY20	Scenario Bud	Depart 6240-		Manage Requests	•	🕼 Fill Position				<i>.</i>	1
Į.					Edit	•	🕼 Add Employee Assignme	ent	ition FTE	Base Sala	ry	
					Adjust	•		Y	earTotal	YearTotal	 	,
	American	0488825	M8	14	Supporting Detail		10 - Custodian		0.5	1	6,686	
		Second Star					10 - Custodian		0.50	1	8 102	

The below prompt will appear. Click "OK"

0210 0001					
			Position FTE	Base Salary	(
			YearTotal 🗙	YearTotal	Yea
3	Custodian:00008175	Launch Confirmation Message	0.5	16,686	
	Custodian:00008745	Existing employee details will be cleared.	.50	18,102	
- 906993365	Custodian:00008040	ОК	Cancel .00	36,204	
5	Custodian:00006130	2010 - Gustouian	0.50	18,102	
8	Custodian:00004592	2010 - Custodian	0.50	18,102	
	0		0.50	47.404	

Verify that the Employee and Position info is correc to Vacate and click "Launch"

WPLN: Planner - Vacate Position	N⊖	Launch Canc	el
* Enter Employee: "EM_918832348"	* Enter Position: "PS_00008175"		

You should then see the below it vacating was successful. Click "OK"



In the same Department Roster Form you are in, scroll down towards the bottom to see the Vacant Positions and find the one you just vacated. Highlight the position and right click "Manage Requests" then "Add New Request" then "Add Existing Position"

Plann	ier: Dep	artment Koster	U		•							<u>A</u> ction	is <u>S</u> a\	e <u>R</u> efresi
Years FY20	Scenario Bud	Department 6240-CUSTODIAL SEF	RVICES		Funding Navigation	•	ŀ			¢	Da	ita	Ad hoc	F <u>o</u> rmat
				Roster Navigation		•		Base S	alarv	GS	1		Salarv	Merit Amour
				Manage Position	•			,			Adj	justments		
,					Manage Requests	•		Add Ne	 w Requ	est	•	Be R Ad	nBalance	BegBalance
Vacant		Custodian	:00006939				-					2 Au	0146701 03	
		Custodian	:00004874		Edit		Lei Delete Reques		est		🕼 Add Existing Pos		Position	
		Custodian	:00005118		Adjust	•	G	Approve	e Reque	est	1	_		
		Custodian	:00004153	+=	0 / D / T		_							
		Custodian	:00008175	14	Supporting Detail			Set Red	quest to	uest to Reviewed				
		Custodian	:00008178	©	Change History		0.50		18,102					

The below dialog box will appear. Change the "Enter DeptID" and "Enter Funding Department" to the new Dept ID for the position. Take a moment to verify the other areas and also fill in the Salary and Fund information. As a reminder you will enter in Fund information by clicking on the "Member Selector" icon next to the box.

ena Id	WPLN: Planner - R	Request Exis	sting Sin	gle Incumbent	₿.	<u>L</u> aunch <u>C</u> a	Ad ancel
	* Enter DeptID: * Enter Position: * Enter Job Code: * Enter Employee:	"DP_6240" "PS_00008175" "JC_2010" "EM_VACANT"		* Enter Position FTE (distributions will be added later) * Enter salary (based on FTE) for new position: * Enter Funding Department: * Enter Fundi	1 "DP_6240"		

In this example I am moving this position to Dept 6235. Click "Launch"

WPLN: Planner - Request Existing Single Incumbent	Launch Cancel	Ac
* Enter DeptID: DP_6235 * Enter Position FTE (distributions will be added	1	ner Ian
* Enter Position: "PS_00008175" Realister International In		
* Enter salary based on FTE) for new position:	16686	
* Enter Employee: "EM_VACANT" * Enter Funding Department:	: DP_6235	
* Enter Fund:	FD_NG001	

You should then see the below dialog box and click "OK"

SERVICES				er.
uan.ooooo Custodian:(_	(i) Information WPLN: Planner - R	equest Existing Single Incumber	it was successful	YearTotal 49,404
dian:000046	83	2010 - Custodian	1.00	36,204

You will still see that Vacant Position in this roster but once all the steps are completed in the process then this position will not be seen here.

Next, change the DeptID on this form to the dept in which you've moved the position to. Don't forget to click the arrow button to have the form change to a different dept.

Departme	ent Roster De	epartment Roster by User Variable	Department R	oster by Job Code Salary	Adjustments	
Planı	ner: Depa	rtment Roster 0				
Years	Scenario	Department 6235-GROUNDS MAINTENANCE			(+
1120	buu				Position FTE	Base Salary
					VaarTatal	VeerTetel
ian, iong	ymei - 01000-00-	Oustoulan.0000-00-		2010 - Oustoulan	0.00	

Once the dept has changed in the form scroll to the bottom of the list and find the position.

Years FY20	Scenario Bud	Department 6235-GROUNDS_MAINTENANCE						¢
					Position FTE	Base Salary	GSI	
					YearTotal	YearTotal	YearTota	al
Vacant		Irrigation Specialist	:00004863	0735 - Irrigation Specialist	1.00	42,024		
Reviewed	Positions		<u> </u>					
Requested	Positions							
Vacant		Custodian:0000817	75	2010 - Custodian	1.00	16,686		
		New Single Incumb	ent 23	0748 - Tree Trimmer II	1.00	53,000		

6⁶⁶

As the position is Vacant and under "Requested Positions" you will need to have your Cabinet Budget Officer "Set the Requet to Reviewed" as shown in the below screen. Your cabinet budget officer will either find the position in the same Departmen Roster Form that you are viewing or they can go to the

Requests icon Highlight the position and right click and "Manage Requests" then "Set Request to Reviewed"

		Budget	Review Bud Comper		Roster Navigation	Budg	jet Reports	Jobs	
					Manage Position			_	
Departme	ent Roster D	epartment Roster	by User Variable		Manage Requests	Ad	ld New Request	•	
Planr	ner: Depa	artment Ro	ster 0		Edit	🕨 🔂 De	elete Request		
Years	Scenario	Department			Adjust	🕨 🔂 Ap	prove Request		3
F I ZU	Bua	0235-GROUND		1	Supporting Detail	<table-cell> Se</table-cell>	et Request to Re	viewed	-
				()	Change History				
BARMEN		29786888 8	Groundsworker:0000	Ô	Lock/Unlock Cells	al 1.00	YearTotal 40,260	YearTotal	_
			Gardening Specialist:		Filter	1.00	48,684		
Terrostine	Maoza, oaan kao	OST. CONTRACTOR	Tree Trimmer Ii:00002		0-1	1.00	51,660		
Vacant			Irrigation Specialist:00		Sort	1.00	42,024		
Reviewed	Positions			- 📎	Analyze				
Requeste	d Positions			2	New Ad Hoc Grid				
Vacant			Custodian:00008175 New Single Incumber	Í	Show Reasons for Read-Only Cells	1	16,686 53.000		

Then the Budget Office will have to set the request to Approved. Once that is completed the vacant position will now be listed outside of the Requested or Reviewed categories.

Years FY20	Scenario Bud	Department 6235-GROUN	IDS_MAINTENANCE			
					Position FTE	Base Sal
					YearTotal	YearTot
Roque Carr	ranza, Gerardo	- 918830619	Groundsworker:00009382	0731 - Groundsworker	1.00	
Sommers, Frederick - 913023350		Gardening Specialist:00003813	0745 - Gardening Specialist	1.00		
Torres Mendoza, Juan - 900018254		Tree Trimmer Ii:00002553	0748 - Tree Trimmer II	1.00		
Vacant			Irrigation Specialist:00004863	0735 - Irrigation Specialist	1.00	
			Custodian:00008175	2010 - Custodian	1.00	
Reviewed F	Positions					
Requested	Positions					
Vacant			New Single Incumbent 23	0748 - Tree Trimmer II	1.00	-

Highlight the position and right click and select "Manage Postiion" then "Fill Position"

Plann	er: Depa	artment F	Roster 🛛		۵		1			120	ୖ୕ୣ
Years FY20	Years Scenario Department FY20 Bud 6235-GROUNDS_MAINTE		IDS MAINTENANCE		Funding Navigation	•	F			¢	C
					Roster Navigation	•		Base Salary	GSI		Sal
					Manage Position	•	G	Vacate Positio	on		Adjust
Roque Car	ranza, Gerardo -	918830619	Groundsworker:00009382		Manage Requests	•	¢	Fill Position			BegBa
Sommers,	Frederick - 9130	23350	Gardening Specialist:00003		Edit	•	G	Add Employe	e Assignn	nent	
Torres Mer	ndoza, Juan - 90	0018254	Tree Trimmer Ii:00002553		Adjust		0	51,000	-	_	
Vacant			Irrigation Specialist:000048		Adjust		0	42,024			
			Custodian:00008175	1	Supporting Detail		1	16,686			
Reviewed I	Positions			853	Change Llister		[]				
Requested	Positions			G	Change History						
Vacant			New Single Incumbent 23		Lock/Unlock Cells		0	53,000			
					Filter	•					

Click "OK"

AINTENANCE	Launo Vacant	ch Confirmation Messa details will be removed.	ige		8 alary
			ОК	Cancel	otal
idation Specialist-0	0004863	0735 - Irrigation Specialist		1.00	42.024

The below screen will appear. You will now change the Employee ID by clicking on the Member Selector

WPLN: Planner - Fill Position	Launch Cancel
* Enter Employee: "EM_VACANT"	* Enter Position: "PS_00008175"

You can type in the employee ID number then hit "Enter" on your keyboard. Then select the Employee ID and click "OK".

Select a Member		<u>O</u> K Cance <u>I</u>
Employee EM_VACANT		ا
918832348		
Employee	EM_ALL	
EM_ALL	EM_EXISTING_DEFAULT	
	VACANT	

Once you see the employee ID populated you will then click "Launch"

You should then see the Employee now listed in the Position with the Salary and FTE associated in your Department Roster.

Debarment voster | Debarment voster på oper kanapie | Debarment voster på opp cone | Saratà voltarmente

Planner: Department Roster 0										
Years FY20	Scenario Bud	Department 6235-GROUNDS	S_MAINTENANCE						¢	
						Position FTE	Base Salary	GSI		
						YearTotal	YearTotal	YearTota	al	
<i>himanasian</i>			Custodian:000081	75	2010 - Custodian	1.00	16,686			
Doctipition		•	Lead Groundswork	ker:00002988	0726 - Lead Groundsworker	1.00	58,284			

ADDING INCREMENTAL FTE AND SALARY TO AN EXISITING POSITION

There might be instances where the position's FTE and Salary are less than what the amount is currently. For example, if your Dept Roster shows that for a position the FTE is .4 but that position is currently at .6 FTE. In order to add the incremental amount for FTE AND Salary you can follow the below steps. If the FTE is the correct number then you will only need to add a Salary Adjustment to the position and will NOT need to follow all of these steps.

In your Department Roster form highlight the position you would like to add the incremental FTE and Salary to. Be sure to write down on a piece of paper the Employee ID, Job Code, Position Number, etc before continuing. Right click and go to "Manage Requests" then "Add New Request" then "Add Existing Position."

Departme	ent Roster D	epartment		Funding Navigation	•	by Job Code Salary Adjust	men	ts		
Planr	ner: Depa	artmer		Roster Navigation	•					S.S.
Veere	Connerio	Departme		Manage Position	•					
FY20	Bud	6240-Cl		Manage Requests	•	Add New Request	•	違 Add No	ew Position	Ŷ
				Edit	•	😰 Delete Request		違 Add Ex	kisting Position	GSI
				Adjust	•	🕼 Approve Request		arTotal	YearTotal	YearTo
Alv		3:	*#	Supporting Detail		😨 Set Request to Review	ed	0.50	4 :2 2	
Barrios	0	453	()	Change History		- Custodian		0.5	1.44	
Chan Vor	avi 016/71130					Custodian		0.50	18 102	

The below screen will display. Confirm that the populated areas are correct and then populate the "Enter Position FTE" and "Enter Salary" for the total amount of both that you want to add. Also select the "Fund." Then click "Launch."

/PI N: Planner - F	Request Existing S	ingle Incumbent	
	cequeor Existing o	ingle moundent	Launch <u>C</u> ancel
* Enter DeptID:	"DP_6240"	* Enter Position FTE	
* Enter Position:	"PS_00004592"	(distributions will be added later)	
* Enter Job Code:	"JC_2010"	* Enter salary (based on FTE) for new position:	
* Enter Employee:	"EM_916424488"	* Enter Funding Department:	DP_6240"
		* Enter Fund	P2
		1	

If successful the below dialog box will appear.

	8
(i) Information	
WPLN: Planner - Request Existing Single Incumbent was successful.	Yea
ОК	

If you scroll down to the bottom of your Dept Roster Form you should see the FTE and Salary added under the Requested Positions category. You will now need to have your Cabinet Budget Officer "Set the Request to Reviewed." Once that is complete the Budget office will Approve the request and then it will be reflected in your Dept Roster Budget.

ZERO FTE AND SALARY FOR A POSITION

In order to zero out dollars associated with a position you will need to zero out the Salary and also the Distributed FTE. Zeroing out both is important as you will want to make sure the benefits associated are also zeroed out and benefits calculations are driven by the salary input and the Distributed FTE input.

In the Department Roster Form you will first adjust the salary in the Salary Adjustment column to zero out the salary. Then click "Save" You have now adjusted the salary to be zero. To zero out the Distributed FTE you will then follow the next step.

Department	Department Roster Department Roster by User Variable Department Roster by Job Code Salary Adjustments										
Planne	Planner: Department Roster 👔										
Years FY20	Years Scenario Department FY20 Bud 6240-CUSTODIAL_SERVICES										
					Position FTE	Base Salary	GSI	Salary Adjustments	Merit Amount	Confirmed	To
	-	_			YearTotal	YearTotal	YearTotal	BegBalance	BegBalance	BegBalance	Y
Au,		Custodian:00008	2010 - C	ustodian	0.50	18,102		-18,102			

In the Dept Funding Form, for that same position/employee you will then type in a "0" in the Funding %. Do not leave it blank but instead type in "0". Then click "Save" You have now zeroed out the Distributed FTE.

S.	Department F	Funding Emp	ployee Funding Position Fundir	ıg					
ĕ	Planner:								
28	Years FY20	Scenario Bud	Department 6240-CUSTODIAL_SERVICES						
50							Funding %	Avg Funding %	Distributed Salary
							YearTotal	YearTotal	YearTotal
	Working	Au, 1000		Custodian:00008	2010 - Custodian	NG001-GENERAL SUPPORT & STUDENT FEES	1	1.00	18,102

BUDGETING FOR FACULTY EARLY RETIREMENT PROGRAM (FERP)

In PBCS, some of the FERPs are listed with 1.00 FTE although their appointment should only be 0.50 since they work for only one semester. In order to adjust this for budgeting, please change the funding percentage from 1.00 to 0.50. This will adjust the distributed FTE from 1.00 to 0.50 and reflect in the Department Roster Report.

1. Click on Funding icon on the left vertical menu on the Budget Compensation form/page
| | | | Budget Review | Budget
Compensation | Budget O
Reve | pEx and Bunnue Cor | dget Other | Budget Reports | Jobs |
|----------------------------|-----------------|-------------------------------------|-------------------|------------------------|------------------|-----------------------------------|--------------------------|------------------|-------------------------------------|
| Departme
Plann | ent Roster Dep | ment Roster by User Variable | Department Roster | by Job Code Salar | ry Adjustment | s 🦻 Vacanc | y Initial vs Worki | ng | |
| | | | | | | | | | |
| Years
FY20 | Scenario
Bud | Department
3490-CREATIVE_WRITING | | | | | | | |
| Years
FY20 | Scenario
Bud | Department
3490-CREATIVE_WRITING | | FERP | should | Position FTE | Base Salary | GSI | Salary
Adjustments |
| Years
FY20 | Scenario
Bud | Department
3490-CREATIVE_WRITING | | FERP
be a | should
it 0.5 | Position FTE
YearTotal | Base Salary
YearTotal | GSI
YearTotal | Salary
Adjustments
BegBalance |
| Years
FY20
Chai, May | Scenario
Bud | Department
3490-CREATIVE_WRITING | 23 | FERP
be a | should
It 0.5 | Position FTE
YearTotal
1.00 | Base Salary
YearTotal | GSI
YearTotal | Salary
Adjustments
BegBalance |

2. Change funding % from 1.00 to 0.50 on the employee/position line

ഷ്ണീ	Departmen	t Funding En	nployee Funding Posit	ion Funding		_			
R	Planne	r: Depart	ment Funding	0				and a	Actions -
2.8	Years FY20	Scenario Bud	Department 3490-CREATIVE_WR	ITING				/	Oata
5						Adjusted funding % from 1.00 to 0.50. This	Funding %	Avg Funding %	Distributed Salary
						FTE to 0.50	YearTotal	YearTotal	YearTotal
	Working	Chai, Ma	y-Lee - 901500254	Instr Fac Ay:00001391	2360 - Instr Fac AY	NG001-GENERAL SUPPORT & STUDENT FEES	1.00	1.00	808
		Chernoff,	Maxine - 900011806	Instr Fac Ay:00002005	2360 - Instr Fac AY	NG001-GENERAL SUPPORT & STUDENT FEES	0.50	0.50	544

3. Go to the Department Roster Report to check

P/L Budget Report P/L Budget Division Report Department Roster Act vs Bud Department Roster

Department Roster File Format HTML Years Scenario Department FY20 Bud DP_3490 HTML Preview * San Francisco State University SAN FRANCISCO FY 20-21 US. STATE UNIVERSITY FTE at 0.50 **Department Roster** Salary Benefits Tax NG001-GENERAL SUPPORT Chai, May-Lee -3490-CREATIVE_WRITING & STUDENT FEES 901500254 NG001-GENERAL SUPPORT Chemoff Maxine -3490-CREATIVE_WRITING & STUDENT FEES 900011806 Total Comp Instr Fac Ay:00001391 2360 - Instr Fac AY 1.00 .808 .934 6.411 153 Instr Fac Ay:00002005 2360 - Instr Fac AY 0.50 544 ,430 4,555 529

FIXING ZERO FTE AND ZERO SALARY ON SINGLE INCUMBENT POSITION

A position may display with zero FTE and zero salary in the Department Roster for Single incumbent. This is due to that the position has not been used. In order to fix this, Add Existing Position is recommended. This process will go through the approval steps.

- 1. Right click on the position with zero FTE and zero salary, select Manage Requests→Add New Request→Add Existing Position
- 2. Populate the fields required and Launch
- 3. Once Request is fully approved, it will be added to the Working Budget
 - 1. Right click on the position with zero FTE and zero salary, select Manage Requests→Add New Request→Add Existing Position

2 ² 11	Departme	nt Roster Dep	partment Roster by User Variable Departm	ent Roster by Job Code Salary Adjus	stments 🦐 Vacancy	/ Initial vs Working
Xe	Plann	er: Depart	ment Roster 0			
@ Fi	Years FY20	Scenario Bud	Department 4015-AVP_&_DEAN_OF_STUDENTS	Position# 00009888 showed zero FTE and Base Salary	Position FTE	Base Salary
					YearTotal	YearTotal
	Vacant		Administrator lii:00002813	3306 - Administrator III	1.00	82,740
			Ssp li:00009888	3082 - SSP II	(0)

SFSTATE TEST Planning and Budgeting Cloud: SFSU		Funding Navigation Roster Navigation Manage Position	* * *				Ê	
Department Roster Department Roster by User Variable Department F Planner: Department Roster	*#	Manage Requests Edit Adjust Supporting Detail	A A A		Add New Request Delete Request Approve Request Set Request to Revi	ewed	Add New Position	ition
Years Scenario Department FY20 Bud 4015-AVP_&_DEAN_OF_STUDENTS	(Change History Lock/Unlock Cells Filter Sort	* *	E	Base Salary	GSI	Salary Adjustments	Merit
Vacant Administrator IIi:00002813 Ssp II:00009888	() ()	Analyze New Ad Hoc Grid		1.00	9ear Iotal 82,740 0	Year lotal	BegBalance	BegB
Reviewed Positions Requested Positions	<u></u>	Show Reasons for Read-Only Cells Predictive Planning						

2. Populate the required fields and Launch

* Enter DeptID:	"DP 4015"	* Enter Position FTE		
		(distributions will be added later)	1	
* Enter Position:	"PS_00009888"	* Enter salary (based on FTE) for new position:	50000	
* Enter Job Code:	"JC_3082"	* Enter Funding Department:	"DP_4015"	प * Er
* Enter Employee:	"EM_VACANT"	* Enter Fund:	FD_NG001	Fur
				=

3. Once Request is fully approved, it will be added to the Working Budget

Pla	nner: Depar	tment Roster	Position#0009888 i Positions queue. C	is in the Requested		
Years FY20	Scenario Bud	Department 4015-AVP_&_DEAN_OF_STUDENTS	through the approva will replace the	al steps, the position existing values.	1	
2				Position FTE	Base Salary	GSI
				YearTotal	YearTotal	YearTotal
Vaca	nt	Administrator Iii:00002813	3306 - Administrator III	1.00	82,740	
		Ssp li:00009888	3082 - SSP II		0	
Revie	ewed Positions					
	ested Positions					
Requ						

545546	3000 S	1 (1993)				
Plann Years	er: Depart	Department	Position#000 and displa	09888 has been fully ayed as part of the W	approved orking	
FY20	Bud	4015-AVP_&_DEAN_OF_STUDENTS	Budget	With FIE and Base Sa	alary	
						0.01
				Position FTE	Base Salary	GSI
				YearTotal	Base Salary YearTotal	YearTot
Vacant		Administrator lii:00002813	3306 - Administrator III	YearTotal	YearTotal 82,740	YearTot

SECTION 3: NAVIGATION OVERVIEW – CYP (CURRENT YEAR PROJECTION)

CYP OVERVIEW

The Current Year Projection (CYP) module in PBCS will be used for the financial forecast the campus will conduct throughout the year. This module is very similar to the Budget Module but with a few differences that will be described in the following sections.

To provide a guided approach through the completion of CYP, a specific "Navigation Flow" has been created as shown below. By selecting the "CYP" icon, a series of nested icons will be displayed. To start with the navigation flow, select the "CYP Review" icon.

Note: Once comfortable with the capabilities of each icon, any of the icons can be selected to launch the CYP flow.

Note: If an error shows on opening, refer to the "INITIAL SETUP" section to set user variable preferences.



Once opened, the same icons will show across the top for easy access. A definition of each is provided below:



• <u>CYP Review</u>

- Displays read-only forms that can be used to review and/or launch into more detailed forms
- Note: "Launch forms" are summary forms that allow for right-click navigation to detailed forms for specific data entry

<u>CYP Compensation</u>

- o Contains the process to maintain Single Incumbent positions ONLY
- Note: Entries in this process will utilize the 30-minute schedule (7AM-11PM PST) to update data in the "CYP Review" section

• <u>CYP OpEx and Revenue</u>

- Includes standard forms for both non-compensation expenses and revenue by program
- Note: Entries in this process will be updated on-save to update data in the "CYP Review" section

• <u>CYP Other Compensation</u>

- Contains the remaining compensation processes outside of single incumbents, including pools and natural accounts (i.e. overtime)
- Note: Entries in this process will utilize the 30-minute schedule (7AM-11PM PST) to update data in the "CYP Review" section

• <u>CYP Reports</u>

- Contains financial reports to offer canned, formatted reports
- Note: These reports are meant to be quick, formatted reports that can be opened in PDF, HTML, or Excel; they are NOT meant to act as interactive dashboards nor as "launch forms" similar to those in "CYP Review"

CYP Terminology

TERM	DEFINITION
СҮР	Current Year Projection or the financial forecast
	for a fiscal year
In-month(s)	An in-month are months that the month is closed
	and have actuals in those months. For example,
	after October fiscal month closes, the in-months
	are July, August, September, and October.
Out-month(s)	An out-month are months that are forecasted
	months.

SALARIES & WAGES

CYP vs HRLOAD – SINGLE INCUMBENT REVIEW FORM

			CYP Review	CYP Compensation	CYP OpEx and Revenue	CYP Othe Compensati	r CYP Re
Planner: R Planne	eview CYP	Planner: Compare HR to CYP Department Roster - H	Planner: Compare	Last Month Act vs First Mor	nth Projection		
Years FY20	Departme 6020-BUI	ent DGET_ADMIN&_OPEROFFICE			CVP	HDLogd	Ver CVD vs
					Total Salary BegBalance	Total Salary BegBalance	HRLoad

Once the budget is finalized for a fiscal year, HRMS and ePBCS should be very close (if all workforce actions were approved in HRMS) as the starting point of CYP. Depending on when the campus conducts its first forecast, that will determine the starting point of CYP for single incumbents. CYP is loaded once, with data sourced from HRMS, as the starting point of CYP. As we move through the year, CYP will be the last input by a user. CYP will incorporate the in months (actuals) plus the out months (forecast) to add up to a year total forecast.

HRLOAD is sourced from HRMS. The data is loaded nightly into PBCS.

All vacant positions will be brought over from HRMS with zero salary. A user can either "Sync with HR" (see below instructions) the position or a user can type in the amount in the Salary Adjustments column.

Note: Sync with HR if no changes to the base salary of the previous incumbent that left the position are included in the budget plan or your forecast.

In the Department Roster Forms the CYP column is giving you the annual salary and FTE for a single incumbent. This will match the CYP column in the above screenshot of Planner: CYP Dept Roster – HR vs CYP.



SYNC WITH HRLOAD FUNCTION

In two forms the "Sync with HR" function can be used. By right clicking to locate and execute this function, a user is able to replace what is in CYP for a position/dept to what is being updated nightly from HRMS. This function can be useful if a user sees that the HRLoad is a more appropriate starting point of CYP.

The first form this function can be used is Planner: CYP Department Roster - HR vs CYP



The second form this function can be used is Planner: CYP Department Roster

=	SF STATE PROD	Planning and Budgeting Cloud: SFS	SU		~	A
				C	YP Funding Navigation	
				C	YP Roster Navigation	
			CYP Review CYP Compensation	C	YP Manage Position	CYP Vacate Position
				E	dit	CYP Fill Position
21	Department Roster	Department Roster by User Variable	Department Roster by Job Code Salary Adju	A	djust	CYP Add Employee Assignment
1		•		撞 Si	upporting Detail	CYP Sync Position from HRLoad
2	Planner: CY	P Department Roster	0	🛐 C	hange History	
ر ر	Years Scen	ario Department		🔒 Lo	ock/Unlock Cells	
	FY20 CYP	6020-BUDGET_ADMIN&_C	DPEROFFICE	Fi	ilter	

BULK AMOUNT TO GL ACCOUNTS – SALARIES AND WAGES

In the CYP module users are able to add a bulk amount to all Salaries & Wages GL accounts. The bulk amount will not apply to any single incumbent but will appear as an entry on its own. Please refer to the Financial Oversight Instructions for examples of when appropriate to use this

EXPENSES AND REVENUES

Forecasting operating expenses and revenues in the forms is similar to the budget forms. The difference

in these forms that if you open up the year total by clicking **YearTotal** on the "+" to expand the detail down to the months, you will see that the in-months are greyed out as those are actuals. A user will not be able to enter into these columns. A user will need to input the out-months by month or a user can input into YearTotal. The out-months are seeded with the final budget for that fiscal year. If entering into YearTotal, keep in mind that YearTotal will take that amount subtracting the in-months then will spread the difference evenly to the out-months.

The expense and revenue forms do not populate the out months based on a formula. To make changes to CYP you have to update the out-months.

SECTION 4: REPORTS



The Budget module, CYP module, and Daily Reports all contain different reports suitable for that particular module. Below is a table with a short description of each report.

MODULE	REPORT NAME	DESCRIPTION	DIMENSIONS THAT CAN BE CHANGED IN REPORT
Budget	P&L and FTE Report	P&L format report with prior year actuals	Year, Scenario,
		compared to user selection, for \$ and FIE.	Version, Dept, Fund
Budget	P&L Budget Division Report	P&L format report and will break down each	Period, Year,
		dept level below the highest grouping	Scenario, Version,
		selected, in each column.	Dept, Fund
Budget	Dept Roster PrYr Act vs Bud	List of dept positions with associated fund,	Period, Dept, Fund
		GL account, job code, employee. Actuals vs	
		Budget Initial vs Budget Working for \$ and	
D. de el	Deside and Deside a	FIE.	New Deat
Budget	Department Roster	List of dept positions with associated job	Year, Dept
		tode, rund, employee, FTE, salary, benefits,	
D. d. d.		taxes, and total compensation.	
Budget	Dept Roster – Req and	List of dept requested and revelwed	Year, Dept
	Reviewed	positions with associated job code, rund,	
		total componention	
CVD	Einancial Review Report	In a D&L format, prior VTD actuals compared	Vear Dept Fund
CTP		to current VTD actuals. Also provides	rear, Dept, runu
		current year Original Budget and Poy	
		Budget The report provides the current	
		YTD actuals the forecast for remaining fiscal	
		vear which equals to total CYP. The accounts	
		are rolled at the account category level.	
		The forecast column is computed as the	
		difference between the CYP (from the CYP	
		Working) and Actuals(CFS)	
СҮР	CYP Budget Division Report	P&L format report and will break down each	Period, Year,
		dept level below the highest grouping	Scenario, Version,
		selected, in each column.	Dept, Fund

СҮР	CYP Compensation	CYP vs Budget Final for vs HRLoad for	Year, Dept, Fund
	Comparison	salaries and FTE. Click on the numbers to	
		hyperlink to a detailed report by position.	
СҮР	CYP Detailed Compensation	CYP vs Budget Final for vs HRLoad for	Year, Dept, Fund
	Comparison	salaries and FTE by position.	
СҮР	Dept Roster Act vs CYP	List of dept positions with associated fund,	Period, Dept, Fund
		GL account, job code, employee. Actuals vs	
		Budget Initial vs CYP Working for \$ and FTE.	
СҮР	Department Roster	List of dept positions with associated job	Year, Scenario, Dept
		code, fund, employee, FTE, salary, benefits,	
		taxes, and total compensation as adjusted in	
		the CYP Working roster.	
СҮР	Department Roster – Final	List of dept positions with associated job	Year, Dept
	Org Budget	code, fund, employee, FTE, salary, benefits,	
		taxes, and total compensation as adjusted in	
		the final original budget roster.	
СҮР	Financial Review – NR401	In a P&L format, prior YTD actuals compared	Year, Dept
		to current YTD actuals. Also provides	
		current year Original Budget and Rev Budget	
		(in this report the Rev Budget excludes	
		Original Budget). The report provides the	
		current YTD actuals, the forecast for	
		remaining fiscal year which equals to total	
		CVP. The accounts are rolled at the account	
		category level.	
		The forecast column is computed as the	
		difference between the CYP (from the CYP	
		Working) and Actuals(CFS)	
Daily	Vacancy Savings Report	Actuals compared to Original Budget for the	Period, Dept, Fund
Reports		current fiscal year to determine savings	
		from actual vacancies vs salaries savings	
1	1		

Making a salary adjustment on a single incumbent position for Current Year Projection (CYP) by using the Department Roster Form

- 1. Keep in mind that this is a CYP module which you are projecting for the out-months.
- 2. For example, if the first quarter (July to September) has closed, you are projecting from October to June.
- 3. The formula is (12 months' salary amount/12 months)*out months. If the goal is to add \$9,000 to a position on CYP, the Department Roster would need to be input a total salary of \$12,000, then it would be (\$12,000/12)*9 out months. The total projection will be \$9,000.
- 4. If the total amount of \$12,000 needs to be adjusted to include retroactivities from July to September, the difference of \$3,000 needs to be input in bulk GL account by using the Natural Account Unsuppressed form.

			CYP Review	CYP Compensa	tion CYP OpEx Revenu	and CYF	P Other bensation	CYP Rep	orts		
Departme Plann	ent Roster Department Roster er: CYP Departmer	by User Variable Department	nent Roster by Job C	ode Salary Adjustn	nents 🦐 Vaca	ncy Initial vs Work	ing F	rior to ac to posi 00003	lding 9K tion# 840		
Years FY20	CYP 6235-GROU	NDS_MAINTENANCE									
					Position FTE	Base Salary	Salary Adjustments	Merit A	mount	Confirmed	Total Sal
					BegBalance	BegBalance	BegBalanc	BegBa	lance E	BegBalance	BegBalar
Beall, Tim	othy - 910509189	Lead Groundsworker:	00002988 0726 - L	ead Groundsworker	1.00	284					
Enriquez,	Baudelio - 900045684	Lead Groundsworker:	00001109 0726 - L	ead Groundsworker	1.00	144					
Flores-Go	onzales, Erasmo - 900031813	Lead Groundsworker:	00003721 0726 - L	ead Groundsworker	1.00	164					
Hernande	z Paniagua, Alejandro - 9188196	8 Gardener:00003397	0743 - 0	ardener	1.00	780					
Martinez	Ricardo - 900044995	Lead Groundsworker	00004820 0726 - 1	ead Groundsworker	1.00	169					
P	Pohert - 918	Administrator II:00003	840 3312 4	dministrator II	1.00	84 720					
Rivera U	orpon 017060260	Groundsworker:00003	00e 0704 C	roundsworker	1.00	470					
Rivera, He	Cilian - 91/900300	Groundsworker.00002	000 0731-0	a ounusworker	1.00	,472					
Roque Ca	arranza, Gerardo - 918830619	Groundsworker:00009	382 0731 - G	roundsworker	1.00	,260					
Torres Me	endoza, Juan - 900018254	Tree Trimmer II:00002	553 0748 - T	ree Trimmer II	1.00	,660					
Vacant		Groundsworker:00005	110 0731 - G	iroundsworker	1.00						
Planne	er: CYP Department Co	CYP	Review CYP Com	pensation CYP Opt Rever	Ex and CYP C nue Comper	other CYP sation	Reports Note the f	irst three n and Oct th	ionths ru June	Actio	ns ▼ <u>S</u> av
FY 20-21	6235-GROUNDS_MAINTENANCE					L				/ 0	Data Ad I
						Year	Total J	ul	Aug	Sep	Oct
						Total S	alary				
						Curren Projet	t Year ction	<u>۱</u>	· \		
						Work	king Vo	rking	Vorking	Working	Working
	0509189 L	ad Groundsworker:00002988	0726 - Lead Groundswo	rker NG001-GENERA	L SUPPORT & STUDE	NT FEES	14	4,857	4,85	4,857	4
	> - 900045684 L	ad Groundsworker:00001109	0726 - Lead Groundswo	rker NG001-GENERA	L SUPPORT & STUDE	NT FEES	4	4,512	4,512	4,512	4
	Erasmo - 900031813 L	ad Groundsworker:00003721	0726 - Lead Groundswo	rker NG001-GENERA	L SUPPORT & STUDE	NT FEES		4,347	4,347	4,347	4
	6293835 T	ee Trimmer Ii:00004777	0748 - Tree Trimmer II	NG001-GENERA	L SUPPORT & STUDE	NT FEES	3	4,371	4,371	4,371	
	918837236 G	roundsworker:00005110	0731 - Groundsworker	NG001-GENERA	L SUPPORT & STUDE	NT FEES					
	jua, Alejandro - 918819608 G	ardener:00003397	0743 - Gardener	NG001-GENERA	L SUPPORT & STUDE	NT FEES	10,700	3,565	3,565	3,565	3
	3831685 Ir	igation Specialist:00004863	0735 - Irrigation Special	Ist NG001-GENERA	L SUPPORT & STUDE	NT FEES	37	3,502	3,502	1,433	
	- 900044995	ad Groundsworker:00004820	0126 - Lead Groundswo	NG001-GENERA		NT FEES	84 720	7,014	5,014	5,014	5
RC RC	A A A	ammisuator 11.00003840	0721 Groundswerker	NGUUT-GENERA		NI FEES	72	3 456	3,456	2,456	
	68368	roundsworker: UUUU2906									
	68368 G	roundsworker:00002906	0731 - Groundsworker	NR301-COST RE	COVERY	NI FEES	0	3.355	3,355	3,450	3,

Example: Adding \$9K to position#00003840. The first quarter (July to September) has closed.

		CYP Review	CYP Compensation	CYP OpEx and Revenue	CYP Other Compensation	CYP Reports	
🎸 CYP Comparison	Financial Review Report	🞸 CYP - Vacancy Savings 🛛 🔇	Department Roster Act vs 0	CYP 🔥 Departme	nt Roster		
CYP Compens	ation Comparison						

File Format	HTML	\sim									
Years	Department	Fund									
FY20	DP_6235	FD_NG001									
HTML Preview	v 🗸										
		San Fran State Univ	NCISCO VERSITY			San Fr CYP Co 6235-GR NG001-GENER/	ancisco State Uni mpensation Com FY 20-21 OUNDS_MAINTE AL SUPPORT & S	iversity parison ENANCE STUDENT FEES			
			(Current Year Projection	Current Year Projection	Original Budget	Original Budget		HRLoad	HRLoad	
				Working	FTE	Final	FTE	CYP vs Bud	Initial	FTE	CYP vs HR
	601201-Mpp	/Supervisory		<u>84.720</u>	1.00	<u>84.720</u>	<u>1.00</u>	<u>0</u>	<u>84.720</u>	<u>1.00</u>	0.00
	601300-Supp	port Staff Salary		382.222	7.45	<u>495.408</u>	<u>10.00</u>	<u>-113,186</u>	<u>495.408</u>	<u>10.00</u>	<u>-113,186.36</u>
	601301-Over	rtime		=	-	5.000	=	<u>-5.000</u>	:	=	=
	601834-Staff	f Salaries -Lump Su	m Vac	<u>957</u>	:	:		<u>957</u>	:	:	<u>957.08</u>
	601836-Holid	day Pays		<u>159</u>	:	:	=	<u>159</u>	:	-	<u>159.18</u>
	Salary & Wage	s		468.058	8.45	585.128	11.00	-117.070	580,128	11.00	-112.070.10

CYP Comparison Financial Review Report Financial Review Report -Prior to adding 9K to a position with account 60,1201 File Format HTML V Yaso Department Fund PV20 DP_95236 FD_N6001 STATE UNIVERSITY Fund: NG001-GENERAL SUPPORT & STUDENT FEES

	Actual FY 19-20 YTD 3-September	Actual FY 20-21 YTD 3-September	Change from Prior Year	% of Year Expenses	Original Budget FY 20-21 Standard YearTotal	Revised Budget FY 20-21 Standard YearTotal	Actual FY 20-21 YTD 3-September	Forecast 4-October to 12-June	Current Year Projection FY 20-21 YTD YearTotal	Change from Revised Budget	*
General Fund Allocation	-	-	-	-	-	-	-	-	-	-	-
Other Financial Sources	3,079	3,478	399	23%	15,000	15,000	3,478	11,250	14,728	(272)	(2%)
All Revenue	3,079	3,478	399	23%	15,000	15,000	3,478	11,250	14,728	(272)	(2%)
Total Revenue / Other Sources	3,079	3,478	399	23%	15,000	15,000	3,478	11,250	14,728	(272)	(2%)
601100-Academic Salary											
601103-Graduate Assistant											
601190-Academic Salaries-Lump Sum Vac		-								-	
601304-Teaching Associates		-								-	
601804-Winter Session Fac		-									
601806-Part Time Faculty		-								-	
601807-Substitute Faculty		-								-	
601809-Extension Faculty		-								-	
601810-Summer Session Fac		-							CVD .		
601825-Research Fellow		-							UTF .	-	
601827-Honorarium For Emp Sal Or Ben		-							\$84 720	-	
601828-Reimb Release Time Salary	-	-	-	-		-			QQ1 ,120	-	
601829-Faculty Salary Reimbursement		-									
601833-Acadenic Salaries-Lump Sum Vac		-								-	
Instructional Faculty	-	-	-	-		-				-	
601201-Mpp/Supervisory	20,394	21,180	786	25%	84,720	84,720	21,180	63,540	84,720	0	0%
Management & Supervisory	20,394	21,180	786	25%	84,720	84,720	21,180	63,540	84,720	0	0%
Support Staff	125,034	112,675	(12,360)	23%	500,408	500,408	112,675	270,504	383,179	(117,229)	(23%)
601836-Holiday Pays		159	159	-			159	0	159	159	-
		159	159				159	0	159	159	
Salary & Wages	145,428	134,014	(11,414)	23%	585,128	585,128	134,014	334,044	468,058	(117,070)	(20%)
▶ Travel	58		(58)		700	700		525	525	(175)	(25%)
Services From Other Fnds Agncy	710	742	32	26%	2,900	2,900	742	2,175	2,917	17	1%
▶ Equipment	58,537	-	(58,537)		10,000	10,000		7,500	7,500	(2.500)	(25%)
660003-Supplies And Service	23,626	8,639	(14,986)	14%	60,000	60,000	8,639	45,000	53,639	(6,361)	(11%)
880009-Professional Development	447	-	(447)	-	2 000	2 000		1 500	1 500	(500)	(25%)

Departme	ent Roste	ər					Ŀ								1		
ile Format	ITML	~								l,	Departme Rei	ent Ro port:	oster	1			
Years FY20	Scenario CYP	Department DP_6235								L E	Prior to ac	dding	9K to)			
HTML Preview	~				_					Ĩ	position#	0000	3840)			
							SAN F	RANCISCO University			Sa	n Franc Dep	isco St FY 20- artmen	ate Ui 21 t Rost	niversi ter	ty	
												FTE	Salary	Be	nefits	Tax	Total Comp
						6235- GROUN	DS MAINTENANC	NG001-GENERAL SUPPOR	RT Beall, Timothy - 910509189	Lead Groundsworker 00002988	0726 - Lead 8 Groundsworker		1.00	4	41 406	445	i2 1
						6235-		NG001-GENERAL SUPPOR	RT Enriquez, Baudelio -	Lead	0726 - Lead						
						GROUN 6235-	DS_MAINTENANC	E & STUDENT FEES NG001-GENERAL SUPPORT	900045684 RT Flores-Gonzales.	Groundsworker:00001105	9 Groundsworker 0726 - Lead		1.00	4	38,903	4,09	5 .14
						GROUN	DS_MAINTENANC	E & STUDENT FEES	Erasmo - 900031813	Groundsworker:00003721	1 Groundsworker	1	1.00	4	37,704	3,97	8,84
						GROUN	DS_MAINTENANC	E & STUDENT FEES	906293835	Tree Trimmer II:00004777	7 0748 - Tree Trimmer I	((0.25	3	6,208	99	J7 _3*
						6235- GROUN	DS MAINTENANC	NG001-GENERAL SUPPOR	RT Hernandez Paniagua, Alejandro - 918819608	Gardener 00003397	0743 - Gardener		1.00	0	21 202	3.27	13 24
						6235-		NG001-GENERAL SUPPOR	RT Lund, Karson -	Irrigation	0735 - Irrigation			, i	21,202	0,27	
						GROUN 6235-	DS_MAINTENANC	E & STUDENT FEES NG001-GENERAL SUPPOR	918831685 RT Martinez Ricardo -	Specialist:00004863 Lead	Specialist 0726 - Lead		0.20	7	4,773	73	10
						GROUN	DS_MAINTENANC	E & STUDENT FEES	900044995	Groundsworker:00004820	0 Groundsworker		1.00	8	42,544	4,59	.030
						GROUN	DS_MAINTENANC	E & STUDENT FEES	918828422	Administrator li:00003840	3312 - Administrator II	1	1.00 8	4,720	42,100	6,47	5 133,29
						6235- GROUN	DS MAINTENANC	NG001-GENERAL SUPPOR	RT Rivera, Hernan - 917968368	Groundsworker 00002905	6 0731 - Groundsworker		1.00	12	25 107	3.16	7 76
						6235-		NG001-GENERAL SUPPOR	RT Torres Mendoza, Juan					1			
						6235-	US_MAINTENANC	NG001-GENERAL SUPPOR	- 900018254 RT	Tree Trimmer II:00002553	s 0748 - Tree Trimmer I		1.00	50	30,359	3,94	2 98
						GROUN	DS_MAINTENANC	E & STUDENT FEES	Vacant	Groundsworker:00005110	0 0731 - Groundsworker	r (0.75	-	-		•
						GROUN	DS_MAINTENANC	E& STUDENT FEES	Vacant	Tree Trimmer II:00004777	7 0748 - Tree Trimmer I	((0.75	-			
						6235- GROUN	DS MAINTENANC	NG001-GENERAL SUPPOR E & STUDENT FEES	RT Vacant	Irrigation Specialist:00004863	0735 - Irrigation Specialist		0.75				
						6235-	-		Roque Carranza	1	1						

After adding the 9K:

Pla Years FY20	nner: CY	P De	Department 6235-GROUN	Roster () DS_MAINTENANCE	Note on the has to be in quarter	Departme nput for 9k is not part	ent Roster CYP bec of the pro	form, 12k ause first jection	8	Departm	03840 on ent Roster CYP	with			
						Position FTE	Base Salary	Salary Adjustments	Merit Amount	Confirmed	Total Salary	Grade	Step/Range	Hire Date	Com Fie
						BegBalance	BegBalance	BegBalance	BegBala Je	BegBalance	BegBalance	BegBalance	BegBalance	BegBalance	BegBa
E	sthy - 91			Lead Groundsworker:00002988	0726 - Lead Groundsworker	1.00	58,284				58,284	GR_1	ST_0	9/3/09	
E	Baudelic		4	Lead Groundsworker:00001109	0726 - Lead Groundsworker	1.00	54,144				54,144	GR_1	ST_0	1/8/99	
F.	ızales, E		031813	Lead Groundsworker:00003721	0726 - Lead Groundsworker	1.00	52,164				52,164	GR_1	ST_0	5/6/00	
ŧ.	: Paniag) - 918()8	Gardener:00003397	0743 - Gardener	1.00	42,780				42,780	GR_1	ST_0	6/3/18	
	hy, Robert - ***	8422		Administrator II:00003840	3312 - Administrator II	1.00	84,720	12,000		Yes	96,720	GR_1	ST_0		
N)04499	5	Lead Groundsworker:00004820	0726 - Lead Groundsworker	1.00	60,168				60,168	GR_1	ST_0	2/10/02	
F		68368		Groundsworker:00002906	0731 - Groundsworker	1.00	41,472				41,472	GR_1	ST_0	10/4/17	
F		rdo - 9'	189	Groundsworker:00009382	0731 - Groundsworker	1.00	40,260				40,260	GR_1	ST_0	2/1/19	
Т		- 9000	1	Tree Trimmer II:00002553	0748 - Tree Trimmer II	1.00	51,660				51,660	GR_1	ST_0	1/10/02	
Vaca	nt			Groundsworker:00005110	0731 - Groundsworker	1.00						GR_1	ST_0		
				Tree Trimmer II:00004777	0748 - Tree Trimmer II	1.00						GR_1	ST_0		
				Irrigation Specialist:00004863	0735 - Irrigation Specialist	1.00						GR_1	ST_0		

8	се Д	Planne	r: CYP De	epartmer	nt Compensation CYP	by Month 📵			From Oc	t to June, a	th	9	≝o Action	ns ▼ Save R
8	Ď	Years FY 20-21	Department 6235-GROU	INDS_MAINTE	NANCE				Formula	(12,000/12 months)*9 projecte	d	/ 0	Data Ad hoc
1								YearTotal	YearTotal	Jul	Aug	Sep	Oct	Nov
B))iff is \$9K from the	Total Salary	Total Salary					
							out months; July to	Original Budget	Current Year Projection					
							epraleady closed	Final	Working	Working	Working	Working	Working	Working
		moth	hy -		Lead Groundsworker:00002988	0726 - Lead Groundsworker	NG001-GENERAL SUPPORT & STUDENT FEES	58,284	58,284	4,857	4,857	4,857	4,857	4,857
		z, Ba	aud	4	Lead Groundsworker:00001109	0726 - Lead Groundsworker	NG001-GENERAL SUPPORT & STUDENT FEES	54,144	54,144	4,512	4,512	4,512	4,512	4,512
		Sonz	zale	031813	Lead Groundsworker:00003721	0726 - Lead Groundsworker	NG001-GENERAL SUPPORT & STUDENT FEES	52,164	52,164	4,347	4,347	4,347	4,347	4,347
		Dyla	an -		Tree Trimmer II:00004777	0748 - Tree Trimmer II	NG001-GENERAL SUPPORT & STUDENT FEES	52,452	13,113	4,371	4,371	4,371		
		, Ra	imo		Groundsworker:00005110	0731 - Groundsworker	NG001-GENERAL SUPPORT & STUDENT FEES	40,260						
		tez F	Pan) -	8 Gardener:00003397	0743 - Gardener	NG001-GENERAL SUPPORT & STUDENT FEES	42,780	42,780	3,565	3,565	3,565	3,565	3,565
		arso	m -		Irrigation Specialist:00004863	0735 - Irrigation Specialist	NG001-GENERAL SUPPORT & STUDENT FEES	42,024	8,437	3,502	3,502	1,433		
		z, Ri	ican		Lead Groundsworker:00004820	0726 - Lead Groundsworker	NG001-GENERAL SUPPORT & STUDENT FEES	60,168	60,168	5,014	5,014	5,014	5,014	5,014
		Rob	bert - 918828422	2	Administrator II:00003840	3312 - Administrator II	NG001-GENERAL SUPPORT & STUDENT FEES	84,720	93,720	7,060	7,060	7,060	8,060	8,060
		F	- 91		Groundsworker:00002906	0731 - Groundsworker	NG001-GENERAL SUPPORT & STUDENT FEES	41,472	41,472	3,456	3,456	3,456	3,456	3,456
		F	a, G	Э	Groundsworker:00009382	0731 - Groundsworker	NR301-COST RECOVERY	40,260	40,260	3,355	3,355	3,355	3,355	3,355
		T	a, Ji		Tree Trimmer II:00002553	0748 - Tree Trimmer II	NG001-GENERAL SUPPORT & STUDENT FEES	51,660	51,660	4,305	4,305	4,305	4,305	4,305

😵 CYP Comparison 🔇 Financial Review Report 😵 CYP - Vacancy Savings 😵 Department Roster Act vs CYP 😵 Department Roster

CYP Compensation Comparison

File Format	HTML	~									
Years FY20	Department DP_6235	Fund FD_NG001									
HTML Preview	<i>"</i> ~										
			<mark>San Francisco</mark> State University	Char \$84,720	ged from) to \$93,720	San Fra CYP Cor 6235-GR(NG001-GENERA	ancisco State Uni mpensation Com FY 20-21 OUNDS_MAINTE L SUPPORT & S	iversity iparison ENANCE STUDENT FEES			
				Current Year Projection Curr	ent Year Projection	Original Budget	Original Budget		HRLoad	HRLoad	
				Working	FTE	Final	FTE	CYP vs Bud	Initial	FTE	CYP vs HR
		601201-Mp	o/Supervisory	<u>93,720</u>	<u>1.00</u>	<u>84.720</u>	<u>1.00</u>	<u>9.000</u>	<u>84.720</u>	<u>1.00</u>	9,000.00
		601300-Sup	port Staff Salary	382.222	7.45	495.408	10.00	<u>-113.186</u>	495.408	10.00	<u>-113.186.36</u>
		601301-Ove	rtime	-		5.000		<u>-5.000</u>		-	
		601834-Sta	ff Salaries -Lump Sum Vac	957	-	-	:	<u>957</u>		-	957.08
		601836-Hol	day Pays	<u>159</u>	-	-	-	<u>159</u>		-	<u>159.18</u>
		Salary & Wag	es	<u>477.058</u>	<u>8.45</u>	<u>585,128</u>	<u>11.00</u>	<u>-108.070</u>	<u>580,128</u>	<u>11.00</u>	<u>-103.070.10</u>

😵 CYP Comparison 👔 Financial Review Report 😵 CYP - Vacancy Savings 🔹 Department Roster Act vs CYP 😵 Department Roster

Fall Financ	ial Review Report							Char	nged from \$84	1,720 to		
File Format HTM	ML ~								\$93,720			
Years (Department Fund											
FY20 0	DP_6235 FD_NG001							-				
	SAN FRANCIS STATE UNIVERS	SITY			Fund: M	6235-GROUNDS IG001-GENERAL S	S_MAINTENANCE UPPORT & STUDEN	NT FEES				
		Actual FY 19-20 YTD	Actual FY 20-21 YTD	Change from	% of Year	Original Budget FY 20-21 Standard	Revised Budget FY 20-21 Standard	Actual FY 20-21 YTD	Forecast	Current Year Projection FY 20-21 YTD	Change from Revised Budget	×
		3-September	3-September	Phor tear	Expenses	reariotal	Teariocai	3-September	4-October to 12-June	Teariotai		
	General Fund Allocation				-		-					
	h Other Einenniel Sources	3.079	3.478	299	23%	15,000	15.000	3.478	11.250	14 728	(272)	(2%
	All Revenue	3,079	3,478	399	23%	15,000	15,000	3,478	11,250	14,728	(272)	(2%
	Total Revenue / Other Sources	3,079	3,478	399	23%	15,000	15,000	3,478	11,250	14,728	(272)	(2%
	601100-Academic Salary											
	601103-Graduate Assistant											
	601190-Academic Salaries-Lump Sum Vac											
	601304-Teaching Associates			100 C	100 C					· · · · ·		
	601804-Winter Session Fac											
	601806-Part Time Faculty											
	601807-Substitute Faculty								-			
	601808-Extension Faculty	-	-						-		-	
	601810-Summer Session Fac	-	-						-		-	
	601923 Hesearch Percei	-	-						-		-	
	601828.Rainh Relasse Time Salary											
	601829 Eaculty Salary Reimbursement											
	601833-Acadenic Salaries-Lump Sum Vac											
	Instructional Faculty		-									
	601201-Mpp/Supervisory	20,394	21,180	786	25%	84,720	84,720	21,180	72,540	93,720	9,000	111
	→Management & Supervisory	20,394	21,180	786	25%	84,720	84,720	21,180	72,540	93,720	9,000	115
	Support Staff	125,034	112,675	(12,360)	23%	500,408	500,408	112,675	270,504	383,179	(117,229)	(23%
	Other Salaries & Wages	-	159	159				159	0	159	159	
	Salary & Wages	145,428	134,014	(11,414)	23%	585,128	585,128	134,014	343,044	477,058	(108,070)	(18%
	▶ Travel	58		(58)	-	700	700		525	525	(175)	(25%
	Services From Other Ends Agnoy	710	742	32	26%	2,900	2,900	742	2,175	2,917	17	15
	▶Equipment	58,537		(58,537)		10,000	10,000		7,500	7,500	(2,500)	(25%
	660003-Supplies And Service	23,626	8,639	(14,986)	14%	60,000	60,000	8,639	57,000	65,639	5,639	9%
	660009-Professional Development	447		(447)		2 000	2 000		1 500	1 500	(500)	(25%)

CYP Com	nparison 😵 I	Financial Review	Report 🛛 & CYP - Vacancy Savin	CYP Revie	W CYP Comper	nsation CYP OpEx Revenue Department Roster	and CYP Of Compens	her sation	CYP Re	ports			
Departm	nent Roste	r			_								
File Format	HTML	~											
Years FY20	Scenario	Department DP 6235											
HTML Previev	w 🗸												
			SAN FR STATE U	ANCISCO	1	1	San	Francis F Depar	CO Sta FY 20-2 tment	te Univ ?1 Roster	/ersity	~ }	Total Com
			6235-	NG001-GENERAL SUPPORT	Beall, Timothy -	Lead	0726 - Lead	10	no contry		106		TOLDI COM
			6235- GROUNDS MAINTENANCE	& STUDENT FEES NG001-GENERAL SUPPORT & STUDENT FEES	Enriquez, Baudelio - 900045684	Lead Groundsworker:00002988	0726 - Lead Groundsworker	1.0	0	44	203	4,452	
			6235- GROUNDS_MAINTENANCE	NG001-GENERAL SUPPORT & STUDENT FEES	Flores-Gonzales, Erasmo - 900031813	Lead Groundsworker:00003721	0726 - Lead Groundsworker	1.0	00	64	704	3,978	8
			6235- GROUNDS_MAINTENANCE	NG001-GENERAL SUPPORT & STUDENT FEES	Garrett, Dylan - 906293835	Tree Trimmer Ii:00004777	0748 - Tree Trimmer II	0.2	25	13	208	997	3
			6235- GROUNDS_MAINTENANCE	NG001-GENERAL SUPPORT & STUDENT FEES	Hernandez Paniagua, Alejandro - 918819608	Gardener:00003397	0743 - Gardener	1.0	00	80	202	3,273	2
			6235- GROUNDS_MAINTENANCE	NG001-GENERAL SUPPORT & STUDENT FEES	Lund, Karson - 918831685	Irrigation Specialist:00004863	0735 - Irrigation Specialist	0.2	20	37	773	731	0
			6235- GROUNDS_MAINTENANCE	NG001-GENERAL SUPPORT & STUDENT FEES	Martinez, Ricardo - 900044995	Lead Groundsworker:00004820	0726 - Lead Groundsworker	1.0		68	544	4,590	3
			6235- GROUNDS MAINTENANCE	NG001-GENERAL SUPPORT & STUDENT FEES	Robert -	Administrator Ii:00003840	3312 - Administrator II	1.0	0 93	3,720	46,307	7,164	147,1
			6005	NORT OFNERAL SURROUT	Piwera Herman								
			GROUNDS_MAINTENANCE	& STUDENT FEES	917968368	Groundsworker:00002906	0731 - Groundsworker	1.0	00	72	07	37	.7

Adding employee to a new position

If a new position has been approved in PBCS, the employee information can be filled to attach with that position at a later time even when the new employee is hired after the seed. Here are the examples and steps to achieve that.

											Ê
					Budget Review	Budget Compensation	Budget O Reve	DEx and Bunue Co	dget Other	Budget Reports	Jobs
R		Department	Roster De	epartment Roster by User Variable	Department Roste	er by Job Code Sala	ry Adjustments	Vacancy	nitial vs Working		
Ĩ	ſ	Planne	r: Depai	rtment Roster 0	Г	Let's use New Single	e Incumbent 3 a	15			
 2	L	Years FY21	Scenario Bud	Department 3585-COMPUTER_SCIENCE	L	an example to fill	an employee				
UTU	L							Position FTE	Base Salary	GSI	Salary Adjustments
	L							YearTotal	YearTotal	YearTotal	BegBalance
				Instr Fac Ay:0001003	4 3	2360 - Instr Fac AY			0		
				New Single Incumber	nt 3 🥭 💈	2360 - Instr Fac AY		1.00	100,000		

221	Department	t Roster Dep	partment Roster by U	ser Varia	ble Department Roster I	by Job Code S	alary Adjustments	s 🦆 Vacancy	/ Initial vs Working	
Ĩ	Planne	r: Depart	tment Roste	r O			Highlig	ght the New Singl	e Incumbent 3, righ	
- 2-3	Years FY21	Scenario Bud	Department 3585-COMPUTER		Funding Navigation			sition. And then S	elect Fill Position	e
'1 '1'					Roster Navigation	-	2	Position FTE	Base Salary	GSI
					Manage Position	-	😼 Vacate Posi	ition		
			lasts Ess		Manage Requests	•	📴 Fill Position		Year lotal	YearTotal
			Instr Fac		Edit	•	🔂 Add Employ	vee Assignment	100.000	
	D : 10		New Sing		Adjust	•			-	
	Reviewed P	ositions								
	Requested F	Positions		14	Supporting Detail					
				100	Change History					

				19 <u>1</u>						
				Budget Review	Budge Compensa	t Budget Opl ition Reven	Ex and Budg ue Comp	get Other pensation	Budget Re	
ŝ	Departme	ent Roster De	epartment Roster by User Variable	Department Ros	ter by Job Code	Salary Adjustments	Vacancy In	itial vs Work	ing	
Ş	Plann	er: Depar	tment Roster 0			Select	ОК			
3	Years FY21	Scenario Bud	Department 3585-COMPUTER_SCIENCE							
						Launch Confirmat	ion Message		×	Ad
						Vacant details will be r	emoved.			Be
	Instr Fac Ay:00010034				2360 - Instr F			ок	Cancel	
			New Single Incumbent	:3	2360 - Instr F					





				D	P	1						
				Budget Review	Budget Compensa	tion 👔 Inf	ormation	×	dget Report	is		
R	Department Roster Department Roster by User Variable Department Roster by Job Code Sala						a WPLN: Planner - Fill Position was successful.					
Ĭ	Planner: Department Roster 0							ок				
28	Years FY21	Scenario Bud	Department 3585-COMPUTER_SCIENCE									
UU.	New Single Incumbent 3 is updated with Employee named Harper,						Position FTE	Base Salary	GSI	Adj		
			Angel with 920	1 employee id 285051			YearTotal	YearTotal	YearTotal	Be		
				23	399 - Instr Fac A	Y	1.00	100,000				
	Dujmovic, Jozo - 900008582 Instr Fac Ay:00001736			23	360 - Instr Fac A	Y	1.00	132,276				
	Humayoun, S	Shahrukh - 9188	823 82 Instr Fac Ay:00009707	23	360 - Instr Fac A	Y	1.00	96,000				
	Harper, Angel - 920285051 New Single Incumben			3 23	360 - Instr Fac A	Ý	1.00	100,000				

				M	P								
				Budget Review	Budget Compensation	Budget OpEx and Revenue	Budget Other Compensation	Budget Reports Job	os				
۲. ۲	Department Fu	unding En	nployee Funding Position	Funding									
5	Planner: Department Funding 0										Actions -		
Years Scenario Department FY21 Bud 3585-COMPUTER_SCIENCE Notice in the Europing page, the employee is also								50	🧪 🔅 Data				
vv					updated w	ith the employee in Incumbent	Funding %	Avg Funding %	Distributed Salary				
									YearTotal	YearTotal	YearTotal		
	Working	Aljarrah, A	Abeer - 918827187	Instr Fac Ay:00009100	236	0 - Instr Fac AY	NG001-GENER	AL SUPPORT & STUDENT FEES	0.00	0.00	0		
				2399 - Instr Fac AY		NG025-GRADUATION INITIATIVE 2025		1.00	1.00	100,000			
		Dujmovic	, Jozo - 900008582	Instr Fac Ay:00001736	236	0 - Instr Fac AY	NG001-GENERAL SUPPORT & STUDENT FEES		1.00	1.00	132,276		
		Humayoun, Shahrukh 18833882 Instr Fac A		Instr Fac Ay:00009707	236	0 - Instr Fac AY	NG001-GENER	AL SUPPORT & STUDENT FEES	1.00	1.00	96,000		
	Harper, Angel - 920285051 New Single Incumbent 3					0 - Instr Fac AY	NG025-GRADU	ATION INITIATIVE 2025	1.00	1.00	100,000		

In general, employee can be added/updated to:

- a brand new position with/without the position number
- an existing position
- a filled position
- a vacant position