EMPLOYEE AND POSITION BUDGETING

Please note: This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.

If you have not used one of the new “Mini-Manuals” you may wish to consult the document “Getting the Most Out of Mini-Manuals” prior to using this document.

If you have questions about information in this mini-manual, or, if after reading the entire manual, you cannot find the information you need, please e-mail fab@uvm.edu.

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Use Ctrl+Home to come back to Table of Contents)

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1. Log in to PeopleSoft through the EPM Login www.uvm.edu/~erp/portal/.

2. Navigation: Planning and Budgeting > Activity Preparation > My Planning Workspace

3. The My Planning Workspace search screen will open.

4. Supply the following parameters and click Search when done. Parameters should look like:
   - **Role Name**: Preparer
   - **Business Unit**: UVM01
   - **Planning Model ID**: UVM_20XX_BUDGET (XX = the fiscal year)
   - **Activity**: UVM_EMPLBD
   - **Scenario**: 20XXBUDGET (XX = the fiscal year)
5. The My Planning Workspace screen will open.

   **Note:** Individual security permissions will impact the departments visible in this screen.

6. Click the **Edit** link for Version 1 of the planning center assigned to a specific department.

7. The Position Overview screen will open.
8. From the **Position Overview** screen, it is possible to:

- **Review and Update Employee FTEs**
- **Remove Employees from the Budget Model**
- **Customize the Chartfield Order in Employee Budgeting**
- **Update Employee Salaries**
  - Update all other Employee Salaries
  - Full-Time United Academics Bargaining Unit
  - College of Medicine Salaries for Basic Science Faculty
- **Apply Mass Compensation Adjustments**
- **Review and Modify Salary Distributions**
  - Single Effective Date Distributions
  - Multiple Effective Dated Distributions
  - Complex Salary Distributions

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**Review and Update Employee FTEs**

Use the steps below to review and update employee FTEs in the budget-building model.

**Note**: FTE changes made in the budget-building model do not flow into the HR system; an ePAR action must be submitted.

1. Follow steps 1-7 in **Start Here**

2. The **Position Overview** page provides the main menu used to access employee budgeting pages in which one can manage, adjust, terminate, analyze or inquire on employee assignment data.

3. Use the drop down menu in the **Search and Filter Options** box to select Employees. Click **Search**.
4. Click on the name of the employee whose FTE needs reviewing.

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duck, Donald</td>
</tr>
<tr>
<td>Mouse, Minnie</td>
</tr>
</tbody>
</table>

5. The Employee Job History screen will open.

6. Click the Details tab.

7. The FTE is displayed in the far right column.

8. Click on the Job Detail link next to the FTE on the 07/01 row.
9. The **Employee Job Detail** screen appears:

![Employee Job Detail Screen]

10. Change the FTE to show the FTE the employee will be working in the new fiscal year and click **Apply FTE**.

   **Note:** FTE changes do not automatically flow into the HR system, an ePAR must be submitted.

11. Click the **Save** button. Work on this employee is now finished.

12. Select **Position Overview** at the bottom of the screen.

   ![Position Overview]

13. Repeat for the next employee or return to **My Planning Workspace** by clicking on either **Don't Unlock** or **Unlock** at the top of the screen.
Remove Employees from the Budget Model

Use the steps below to remove an employee from the position budgeting activity of the Budget-Building Model. This is necessary whenever a current employee will not be part of the department on July.

1. Follow steps 1-7 in Start Here

2. The Position Overview page provides the main menu used to access employee budgeting pages in which one can manage, adjust, terminate, analyze or inquire on employee assignment data.

3. Use the drop down menu in the Search and Filter Options box to select Employees. Click Search.

4. Click on the name of the employee to be removed.

5. Staying on the General tab, click on the (-) minus sign at the end of the row to remove the employee.
6. A confirmation message will appear. Click **OK**.

![Delete Confirmation dialog box]

7. The **Employee Job History** page will reappear, with today’s date filled in as the effective date. Leave the data as is and click the **Save** button.

![Employee Job History page]

8. Work on this employee has finished. Select **Position Overview** at the bottom of the screen.

9. Repeat for the next employee or return to **My Planning Workspace** by clicking on either **Don't Unlock** or **Unlock** at the top of the screen.
Update Employee Salaries

Use the steps below to review current year salaries and update new fiscal year salaries for all employees. These instructions pertain to employees not in the full-time United Academics Bargaining Unit, and all non-basic science employees in the College of Medicine. To set other salaries see Full-Time United Academics Bargaining Unit, College of Medicine Salaries for Basic Science Faculty.

Note: Distributions with less than 1% can be processed through EPM. The database is designed to hold two decimal points on the distribution and can accept less than 1% percentages. Distributions with three decimal points should be submitted via online salary Distribution forms to supersede the budget. Distributions should be sent late June so they could be processed before the first payroll of the fiscal year to avoid retro situations and to ensure the encumbrances are correct.

1. Follow steps 1-7 in Start Here

2. The Position Overview page provides the main menu used to access employee budgeting pages in which one can manage, adjust, terminate, analyze or inquire on employee assignment data.

3. Use the drop down menu in the Search and Filter Options box to select Employees. Click Search.

4. Click on the name of the employee whose salary needs to be set.

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duck, Donald</td>
</tr>
<tr>
<td>Mouse, Minnie</td>
</tr>
</tbody>
</table>
5. The **Employee Job History** screen will open.

6. Click the **Details** tab.

7. Click on the amount in the **Salary** column for the effective date of 07/01.  
   **Note:** All new fiscal year salaries must be entered effective 07/01 regardless of appointment.

8. The **Salary Distribution** screen will open.
9. The distribution for 07/01 will be displayed in the middle of the screen.

   **Note:** The salary shown is the employee’s current year salary coming from the HR system.

![Effective Dated Distributions](image)

10. Change the salary amount by typing the correct current year salary in the **Total Salary** box.

   **Note:** The salary must be typed in the Total Salary Box for each line of a multiple distribution.

11. If it is not already checked, click in the box above the distributions called **Apply Salary Distributions**.

![Apply Salary Distributions](image)

12. When the box is checked, a warning message will appear. Click **OK** to continue.

![Message](image)

13. Click **Save**.
Full-Time United Academics Bargaining Unit

1. Follow steps 1-7 in Start Here

2. The Position Overview page provides the main menu used to access employee budgeting pages in which one can manage, adjust, terminate, analyze or inquire on employee assignment data.

3. Use the drop down menu in the Search and Filter Options box to select Employees. Click Search.

4. Click on the name of the employee whose salary needs to be set.

5. The Employee Job History screen will open.

6. Click the Details tab.
7. Click on the amount in the **Salary** column for the effective date of 07/01.
   **Note:** All new fiscal year salaries must be entered effective 07/01 regardless of appointment.

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Effective Sequence</th>
<th>Salary</th>
<th>Subject Earnings</th>
<th>Gross Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01/2011</td>
<td>0</td>
<td>35,278.23</td>
<td>0.00</td>
<td>35,278.23</td>
</tr>
</tbody>
</table>

8. The **Salary Distribution** screen will open.

9. The distribution for 07/01 will be displayed in the middle of the screen. Review the salary amount in the **Total Salary** box.
   **Note:** The salary shown is the employee’s current year salary coming from the HR system. Review the salary for every date in the distribution.

10. If it is not already checked, click in the box above the distributions called **Apply Salary Distributions**.
11. When the box is checked, a warning message will appear. Click OK to continue.

![Warning Message]

12. Click Save.

13. The next step is to enter the components of the employee’s new fiscal year salary. To do so, click on the Earnings/Allowance link at the top of the page.

![Salary Distribution]

14. In the middle of the screen is a section called Earnings/Allowance. Some of the components are percentage increases while others are a fixed dollar amount.

![Earnings/Allowance]

15. There are several components to United Academics faculty increases. Some of the components are percentage increases while others are a fixed dollar amount. Begin by entering the Across-the-Board increase. In the column called % Salary, enter the percentage specified in the salary guidelines.

**Note:** Type the value in whole number terms (e.g. 2% should be entered as 2, not 0.02)
16. Enter the appropriate Earnings Code in the **Earning Code** column.

<table>
<thead>
<tr>
<th>United Academics Earnings Codes</th>
<th>Description</th>
<th>Earnings Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Across-the-Board Increase</td>
<td>070</td>
<td></td>
</tr>
<tr>
<td>Performance Increase</td>
<td>071</td>
<td></td>
</tr>
<tr>
<td>Market Increase</td>
<td>072</td>
<td></td>
</tr>
<tr>
<td>Other Increase</td>
<td>073</td>
<td></td>
</tr>
<tr>
<td>Compression Increase</td>
<td>074</td>
<td></td>
</tr>
<tr>
<td>Promotion Increase</td>
<td>075</td>
<td></td>
</tr>
</tbody>
</table>

17. In the **Account** column, enter the salary account that is appropriate for this employee (for example, 50100 for tenure-track faculty).

18. In the **Account** column, enter the salary account that is appropriate for this employee (for example, 50100 for tenure-track faculty).

19. Add a new row for the next component by clicking the **(+) plus sign** at the end of the first row.

20. Continue adding percent increases or fixed amounts in the appropriate columns, being sure to use the correct earnings code.

21. When finished, the screen might look something like this.
22. Click **Save**. Work on this employee is finished.

23. Select **Position Overview** at the bottom of the screen.

24. Repeat steps for the next employee or return to **My Planning Workspace** by clicking on either **Don’t Unlock** or **Unlock** at the top of the screen.

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**College of Medicine Salaries for Basic Science Faculty**

1. Follow steps 1-7 in [Start Here](#)

2. The **Position Overview** page provides the main menu used to access employee budgeting pages in which one can manage, adjust, terminate, analyze or inquire on employee assignment data.

3. Use the drop down menu in the **Search and Filter Options** box to select Employees. Click **Search**.

4. Click on the name of the employee whose salary needs to be set.

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duck, Donald</td>
</tr>
<tr>
<td>Mouse, Minnie</td>
</tr>
</tbody>
</table>
5. The **Employee Job History** screen will open.

   ![Employee Job History](image1)

6. Click the **Details** tab.

7. Click on the amount in the **Salary** column for the effective date of 07/01.

   **Note:** All new fiscal year salaries must be entered effective 07/01 regardless of appointment.

   ![Salary History](image2)

8. The **Salary Distribution** screen will open.

   ![Salary Distribution](image3)
9. The distribution for 07/01 will be displayed in the middle of the screen. Review the salary displayed in the **Total Salary** box. Repeat for each date in the distribution. 

**Note:** The salary shown is the employee’s current year salary coming from the HR system.

![Effective Dated Distributions](image)

10. Type the Fixed Component of the faculty member’s salary in the **Total Salary** box and press **Enter**. The Total Salary Applied value will update showing the fixed amount.

11. If it is not already checked, click in the box above the distributions called **Apply Salary Distributions**.

![Apply Salary Distributions](image)

12. When the box is checked, a warning message will appear. Click **OK** to continue.

![Message](image)

13. Click **Save**.
14. The next step is to enter the components of the employee's new fiscal year salary. To do so, click on the **Earnings/Allowance** link at the top of the page.

<table>
<thead>
<tr>
<th>Job Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Distribution</td>
</tr>
<tr>
<td>Go to: Position Data</td>
</tr>
</tbody>
</table>

15. In the middle of the screen is a section called **Earnings/Allowance**. Some of the components are percentage increases while others are a fixed dollar amount.

16. In the **Fixed Amount** column, enter the Variable Component of the faculty member's new salary.  
   **Note:** Fixed amount refers to the fact that a flat dollar amount is being added, as opposed to a percentage increase.

17. In the **Earning Code** column, enter 076. This is a unique earnings code that identifies the College of Medicine variable dollars.

18. In the **Account** column, enter the salary account that is appropriate for this employee (for example, 50100 for tenure-track faculty).

19. Click **Save**. Work on this employee is finished

20. Select **Position Overview** at the bottom of the screen.

21. Repeat steps for the next employee or return to **My Planning Workspace** by clicking on either **Don’t Unlock** or **Unlock** at the top of the screen.
Review and Modify Salary Distributions

Single Effective Date Distributions

Use the steps below to review and modify employee distributions for employees who have a single distribution for the year, effective July 1.

**Note:** These steps apply to all faculty and staff with a single distribution for the year, even if those employees have less than a 12-month term. In Commitment Accounting in the Human Resource system, all employee distributions begin on July 1.

1. Follow steps 1-7 in [Start Here](#)

2. The **Position Overview** page provides the main menu used to access employee budgeting pages in which one can manage, adjust, terminate, analyze or inquire on employee assignment data.

3. Use the drop down menu in the **Search and Filter Options** box to select Employees. Click **Search**.

4. Click on the name of the employee for which the distribution should be adjusted.

5. Click on the **Details** tab.

6. Click on the amount in the **Salary** column for the Effective Date of 07/01.
7. Before making any changes, verify that the account displayed in the distribution boxes is correct and check the box labeled **Apply Salary Distributions**. Checking this box ensures that any changes made to salary distributions will carry through to earnings and benefits.

**Note:** The salary box will display the Payroll Distribution Suspense Account. This is correct and should not be changed.

8. When the box is checked a warning message will appear. Click **OK** to continue.

9. The chartstring displayed represents the employee’s current year salary distribution. To change any of the **chart field values**, type a new value in the appropriate column.

**Note:** A value for each chart field except **Project** must be supplied.

10. Click **Save**.

11. Click the **(+) plus sign** to the right of the distribution row to add a new row of data.

12. The row will populate. The distribution effective date defaults to the current date. Change the date to 07/01 when entering lines for the 07/01 effective date.
13. Modify the new row as desired.

14. Repeat until all the rows of distribution for the 07/01 date have been added.

15. When finished, select **Position Overview** at the bottom of the screen.

16. Repeat the steps for the next employee or return to **My Planning Workspace** by clicking on either **Don’t Unlock** or **Unlock** at the top of the screen.
Complex Salary Distributions

Some employee salary distributions can be quite complex. Salaries may be distributed to several chart strings and have multiple effective dates. Because of this complexity, a customization was developed in the employee budgeting activity so that the entire year could be viewed on one page when developing salary distributions.

1. Follow Steps 1-7 in Start Here

2. On My Planning Workspace choose UVM_EMPLBD activity.

3. The Position Overview page provides the main menu used to access employee budgeting pages in which one can manage, adjust, terminate, analyze or inquire on employee assignment data.

4. Select the following from the drop down menu in the Search and Filter Options section and click Search.

5. Click on the name of the employee whose distributions need to be set.

6. Click on the Details tab.
7. Click on the amount in the **Salary** column for the Effective Date of 07/01.

<table>
<thead>
<tr>
<th>Effective Date</th>
<th>Effective Sequence</th>
<th>Salary</th>
<th>Subject Earnings</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/01/2011</td>
<td>0</td>
<td>80,261.85</td>
<td>0.00</td>
</tr>
</tbody>
</table>

8. The **Employee Information** section shows the information regarding the employee for which the distribution is displayed.

9. The **Salary** section shows the default account for the salary displayed. This account is the Payroll Distribution Suspense Account and should be ignored.

10. The **Budget Impact section** calculates an adjusted salary that UVM does not use. Ensure that the **Total Salary** amount displayed here is the salary amount the employee should receive beginning July 1.

11. The **Effective Dated Distributions** section allows for adjustments to the employee’s salary distributions. Each box within this section represents an effective date. Enter rows for each effective date by clicking on the **(+) plus sign** at the end of the row. Change the percentages and chartfield values to reflect the proper distribution per effective date.

12. A new effective date can be entered by clicking on the **(+) plus sign** just above the distribution line. Type the effective date in the **Start Date** along with the sequence.
13. To copy an effective-dated row, click in the box to the left of Select Flag. Then click the Duplicate Selected Rows button. Click Ok. A new effective-dated box will appear with the chartfield values and percentages copied in. Update the effective date, chart field values, and percentages as needed.

14. To delete an effective-dated row, repeat the actions above and click Delete Selected Rows.

15. When finished, click Save. The total dollars attributed to each chartstring for each effective-dated period, as well as the FTE adjusted dollars attributed to each adjust as work is done.

The Position Allowance Model (PAM)

The Position Allowance Model (PAM) is used to enter position budget and position FTE information. It also records the funding commitment(s) that support the position.

Note: It may be helpful to complete employee salary setting activity and then run the Percent Increase Report before beginning this activity.

Utilize PAM Loader to update position budget and position FTE information.

1. Run the Budget Roster Report (during budget building period) or the Roster Report throughout the year.

2. Save the CSV output as an .xls(x) file. Enter position information, updates only, into designated columns of the .xls(x) output file.

3. During budget building use Columns AB – AR of the Budget Roster Report .xls(x) output to enter position data updates including position salaries that are NOT equal to employee New Year salaries, FTEs, funding sources, etc. Refer to Running Budget Roster Report for more details. Submit/email the Excel file created above to Financial Analysis and Budgeting Department.

4. Throughout the year use Columns AC – AS of the Roster Report .xls(x) output to enter position data updates including position salaries, FTEs, funding sources, etc. Refer to Running Roster Report for more details. Submit/email the Excel file created above to Financial Analysis and Budgeting Department.
Access PAM (SKIP THIS SECTION IF YOU ARE USING PAM LOADER)

1. Log in to PeopleSoft through the EPM Login www.uvm.edu/~erp/portal/.

2. Navigation: Planning and Budgeting> Activity Preparation> My Planning Workspace

3. The My Planning Workspace screen. Supply the following parameters then click the Search button.
   
   Note: The Role Name will always be Preparer when working in PAM. There is no Reviewer role as PAM is not submitted for approval.

4. The My Planning Workspace screen will open.
   
   Note: Individual security permissions will impact the departments visible in this screen.

5. Click the Edit link for Version 1 of the planning center assigned to a specific department.
6. The **Position Overview** screen will open.

7. The **Position Overview** screen looks very similar to the **Position Overview** screen used in the employee budgeting activity. The same functionality exists here that is available in the employee budgeting activity. However, because PAM is position-focused not employee-focused, the information is handled differently.

8. Search options may be used to focus on positions in particular job codes or union codes or to find a specific position number.

**Note:** that because this model is position-focused, neither the Employee ID nor Name searches will generate the position associated with a particular employee. Only position information is updated in PAM.

**From here it is possible to:**

- Update employee positions
- Change the Position FTE
Update Employee Positions Using PAM

If you are using the PAM Loader refer to: Use PAM Loader to update employee position budget and position FTE information.

If you are not using the PAM Loader follow the steps below.

1. Follow **Steps 1-6** in Access PAM

2. Click on the title of the position to update.

3. The **Position Data** screen will populate. Here the position’s attributes are displayed such as job code and description, union code, and position FTE. It also displays the most recent effective date for the position data shown.
4. To carry data forward into the new fiscal year, insert a new effective dated row for 07/01, even if the data will not change. Click on the (+) plus sign in the upper right corner of the screen. A new row will be added with today’s date as the default effective date.

5. Change the effective date to 07/01 to agree with the first date in the new fiscal year.

6. The position FTE will default to 1.00 in the new record. If the budget plan is such that the position is funded long-term at less than 1.00 FTE, make the necessary adjustment to the position FTE.
   
   **Note:** Occasionally you may receive an error response when attempting to change the FTE. If this occurs, follow the instructions in Changing the FTE in PAM.

7. When finished making changes, click **Save**. The following message will appear.

   ![Message]

   **Copy forward the salary and distribution information for this position? (20000,2)**

   **Yes** | **No**

8. By choosing **Yes**, the most recent position funding information will copy forward to the 07/01 record just added.

9. To review/update the position funding information and enter the new fiscal year position budget, click on the **Salary Distribution** link in the **Distribution Defaults** portion of the screen.

   **Distribution Defaults**
   
   - Salary Distribution
   - Earnings/Allowance Defaults
   - Benefits Defaults
   - Tax Default
10. A screen much like the following will populate, displaying the most recent position funding information.

11. Position funding information looks similar to employee salary distribution information but it uses fewer chart fields. Use the following fields to identify the position funding:

- **Percentage**: Enter the percentage of the funding that will be supported by this chartstring.
- **Operating Unit**: Leave blank
- **Fund Code**: Choose a valid fund code, using the search feature.
- **Department**: Use this field to indicate the department that will be funding this portion of the position’s budget.
- **Program Code**: This value is used infrequently to indicate a few special areas of funding support. Valid chart field values all begin with B. Use the magnifying glass to see which B values are active. If none of the choices apply to this position leave the field blank.
- **Function**: Leave blank
- **Source**: Use one of two values. To indicate long-term funding support, use 000010; for short-term funding use 000012
- **Project**: Leave blank
- **Purpose**: Leave blank
• **Property:** This field is used to indicate the position term. Valid values begin with B. Use the magnifying glass to search for appropriate options. The values follow a pattern of B plus the number of months in the term. For example, a 9-month term would have a value of B009 while a twelve-month term would be recorded as B012.

12. The funding that supports the position may be split between different departments, fund types, or have both long and short-term components of the same fund type. In these instances, click the (+) plus sign at the end of the row to add additional chart strings.

13. Repeat the steps for each chart string that is needed to fully represent the funding commitment to the position.

14. Click on the Total Salary box when finished and enter the total position budget. This amount represents the annual budget committed to the position, even if the position is unfilled or the incumbent will only be in the position for a portion of the year.

15. When finished, click Save

16. Select Position Overview at the bottom of the screen.

17. Repeat these steps for each position or return to My Planning Workspace by clicking on either Don’t Unlock or Unlock at the top of the screen.

**Note:** Do not electronically submit PAM for approval.
Submit, Reject, or Approve Budgets

Submit Budgets

These instructions are for submitting the employee budgeting activity (UVM_EMPLBD) and line item budgeting activities.

1. Log in to PeopleSoft through the EPM Login www.uvm.edu/~erp/portal/.

2. Navigation: Planning and Budgeting> Activity Preparation> My Planning Workspace

3. The My Planning Workspace search screen will open.

4. Supply the following parameters and click Search when done.
   - Role Name: Use Preparer role to submit budgets and Reviewer role to approve.
   - Business Unit: UVM01
   - Model ID: UVM_20XX_BUDGET (XX = the fiscal year)
   - Activity: UVM_EMPLBD
   - Scenario: 20XXBUDGET (XX = the fiscal year)
5. The **My Planning Workspace** screen will open.  
    **Note:** Individual security permissions will impact the departments visible in this screen.

6. Select the check box next to each planning center that is ready for budget review.

7. Click the **Submit** button. Clicking the Submit button simultaneously submits Version 1 and copies all budget data into the **Master Version**.

8. Use the **Submit Confirmation** screen to verify and approve or cancel the submission.
9. Once submitted, the preparer can no longer update the planning center but does retain the ability to view. If the preparer needs to edit a planning center after it has been submitted, a reviewer must first reject the budget to make it available. The status of a planning center must either be **Open** or **Rejected** to be editable.

10. Reviewers refer to the persons who are responsible for reviewing, analyzing, and approving the budgets submitted by preparers. The reviewer views and rejects planning centers from **My Review Workspace**, which is accessed via a hyperlink in **My Planning Workspace**.

**Reject Budgets**

These instructions are for rejecting a budget that has been submitted.

1. Log in to PeopleSoft through the **EPM Login** [www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/).

2. Navigation: **Planning and Budgeting**> **Activity Preparation**> **My Planning Workspace**

3. The **My Planning Workspace** search screen will open.
4. Supply the following parameters and click **Search** when done.
   Parameters should look like:
   
   **Role Name:** Reviewer  
   **Business Unit:** UVM01  
   **Planning Model ID:** UVM_20XX_BUDGET (XX = the fiscal year)  
   **Activity:** UVM_EMPLBD  
   **Scenario:** 20XXBUDGET (XX = the fiscal year)

5. The **My Planning Workspace** will populate. The look of the page has changed based on the Role Name used to enter the page.
6. Click on the hyperlink in the middle of the screen to enter **My Review Workspace**.

![My Planning Workspace Image]

7. The reviewer can reject a planning center and make it available to the preparer for editing by clicking on the **Reject** button.

8. The **Reject Confirmation** page will ask to verify the rejection.

9. The planning center will now show a status of **Rejected**.

10. The **reviewer** approves a budget by submitting it to the final level in the approval process. Approving the budget occurs in **My Preparation Workspace**.

**Approve Budgets**

1. Click on the hyperlink in the middle of the screen to return to **My Preparation Workspace**.

![My Planning Workspace Image]
2. When the **reviewer** is ready to submit the unit's finished budget to **Financial Analysis & Budgeting (FAB)**, the reviewer selects the check box beside the **Master** Version of the B-level planning center.

3. Click the **Submit** button. Clicking the Submit button simultaneously submits the **Base** and **Master Version**.

4. Use the **Submit Confirmation** screen to verify and approve or cancel the submission.

5. To update a planning center once the B-level is submitted, the **reviewer** must first reject the B-level planning center. Once the B-level is rejected, the **Reject** button becomes available at the planning center level. Once the reviewer rejects a planning center, the preparer is once again able to edit.

   **Note:** There may be several planning centers that roll up to the B-level planning center. In order to submit the B-level to FAB, all planning centers that roll up to it must first be submitted.

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**Investigatory Tools for Budgeting**

**Earnings Reports**

The earnings report is used to identify the fixed and variable components of an employee’s salary. The fixed component is generally input in the **Total Salary** box, while the variable components are input by earnings code on the **Earnings/Allowance** screen. This report is used for identifying and monitoring the earnings codes used in setting faculty salaries.

**Note:** The format of the report is similar to the Percent Increase Report.

**Running the Earnings Reports**

1. Log in to PeopleSoft through the **EPM Login** [www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/).


3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. For help, consult the guide: [General Information on Running Reports and Queries](#).
4. The parameters available for this report will populate.

   **Note:** Role Name will not always prepopulate. If the role name does not prepopulate, select preparer from the drop down menu before proceeding.

   ![Process Request Parameters](image)

5. Enter criteria as appropriate. Include a description in the description field.

   - **Planning Model ID:** UVM_20XX_BUDGET (XX = the fiscal year)
   - **Activity:** UVM_EMPLBD
   - **Scenario:** 20XXBUDGET (XX = the fiscal year)
   - **Planning Center(s):** It is possible to run the report by individual planning center, provide a range of planning centers, or check the box to include all.
   - **Version:** Choose Version 1 from the drop down menu.
6. Union Codes and/or Job codes can be specified on the run control page. Click the arrow to the left of either **Union Code** or **Jobcode/Job Function Code** to expand the area.

![Select Single or Multiple Values](image)

7. Click on the (+) **plus sign** to add multiple codes.

![Jobcode/Job function Code](image)

8. Click **Save** when finished.

9. Click **Run** in the top right corner of the screen.

10. The Process **Scheduler Request** page will appear. It is not necessary to change criteria here. Click **Ok**.

11. This returns the run control page. Click on the **Process Monitor** link in the upper right corner of the screen to view the report. For help with the Process monitor, consult the Mini-Manual **General information on Running Reports and Queries**.

**The Percent Increase Report**

Use these steps to produce a percent increase report in EPM Budget-Building. This report may be helpful at several stages in the budget-building process. It can be used as a tracking tool to view which employees have had increases applied and which are still left to work on. It can also be used at the end of the budget-building process to review the increases and make sure they fall within guidelines.

**Note:** This report is one of the required **Green Reports** and the .pdf output should be saved to the shared drive designated to budget reports.
Running the Percent Increase Report

The report is sorted by department, job function code, and then employee last name. The job function code groups similar positions to enable viewing faculty, administrators, and staff in separate groups.

The report shows a current year salary and an adjusted current year salary as well as a new year salary and an adjusted new year salary. The adjusted salary columns are calculated by dividing the regular salary by the FTE. Comparison of salaries for people who work less than a full FTE with those who are working full-time is possible.

**Note:** The adjusted salaries do not take into account employee terms. To compare full and reduced FTE’s, prepare the calculation manually.

1. Log in to PeopleSoft through the **EPM Login** [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal).

2. Navigation: **UVM Reports > Percent Increase Report**

3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. For help, consult **General Information on Running Reports and Queries.**
4. The parameters available for this report will populate.
   
   **Note:** Role Name will not always prepopulate. If the role name does not prepopulate, select preparer from the drop down menu before proceeding.

![Percent Increase Report](image)

5. Enter criteria as appropriate. Include a description in the description field.

   - **Planning Model ID:** UVM_20XX_BUDGET (XX = the fiscal year)
   - **Activity:** UVM_EMPLBD
   - **Scenario:** 20XXBUDGET (XX = the fiscal year)
   - **Planning Center(s):** It is possible to run the report by individual planning center, provide a range of planning centers, or check the box to include all.
   - **Version:** Choose Version 1 from the drop down menu.
• **Maximum % Increase:** If a value is entered, the report will limit the data to only those individuals who exceed the maximum percentage specified.

• **Minimum % Increase:** If a value is entered, the report will limit the data to only those individuals who exceed the minimum percentage specified.

6. Union codes can be specified on the run control page. Click the arrow to the left of the **Union Code** to expand the area.

7. Click on the **(+)** plus sign to add multiple codes.

8. Click **Save** when finished.

9. Click **Run** in the top right corner of the screen.

10. The Process **Scheduler Request** page will appear. It is not necessary to change criteria here. Click **Ok**.

11. This returns the run control page. Click on the **Process Monitor** link in the upper right corner of the screen to view the report. For help with the Process monitor, consult the Mini-Manual **General information on Running Reports and Queries**.

12. To run the report in PDF format, click on the first check box in the **Process List** and then click **OK**.

13. To run the report in CSV format for use in Excel, click on the second check box in the Process List and then click **OK**.
Salary Distribution Report

Use these steps to produce a salary distribution report in EPM Budget-Building. This report will help verify that each employee is distributed correctly. This is one of the required Green Reports. When finished with budget-building work, save a copy of the output of this report in .pdf format to the shared drive designated to budget reports.

Note: The report is sorted by department, job function code, and then employee last name. The job function code groups similar positions to enable viewing faculty, administrators and staff in separate groups.

Employee home department is added to the .pdf and .csv output of the report.

Running the Salary Distribution Report

1. Log in to PeopleSoft through the EPM Login [www.uvm.edu/~erp/portal].


3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. For help, consult General Information on Running Reports and Queries.
4. The parameters available for this report will populate.

5. Enter criteria as appropriate:

   For the current year select:
   
   - **Role Name**: Preparer
   - **Planning Model ID**: UVM_20XX_BUDGET (XX = the fiscal year)
   - **Activity**: UVM_EMPLBD
   - **Scenario**: 20XXBUDGET (XX = the fiscal year)
   - **Planning Center(s)**: Choose one, multiple centers or check the box to include all.
   - **Version**: Select Version 1 from the drop down menu.
6. Specify specific **funds, union codes, job codes** or **purpose codes**. To use any of these options, click on the right-facing arrow next to the chart field to expand the area.

![Select Single or Multiple Values](image)

7. Use the magnifying glass to look up values or specify the one by typing the value in the box. To add more than one value, click the **(+) plus sign** on the right side of the row.

8. Click **save** when finished.

9. Click **Run** in the upper right corner of the screen.

10. The Process **Scheduler Request** page will appear. It is not necessary to change criteria here. Click **Ok**.

11. This returns the run control page. Click on the **Process Monitor** link in the upper right corner of the screen to view the report. For help with the Process monitor, consult the Mini-Manual [General information on Running Reports and Queries](#).

12. To run the report in PDF format, click on the first check box in the **Process List** and then click **OK**.

**Salary Distribution by Fund Report**

Use these steps to produce a salary distribution by fund report in EPM Budget-Building. This report will show each chartstring to which someone is distributed. Beneath that chartstring, it will show each person who is distributed there along with the percentage of their salary attributed and the corresponding dollar amount.

This is a useful report in identifying those employees who are not assigned to the department, yet a portion of their salaries are distributed to the department.
The report is sorted by fund and, within a fund, by department. *This department is not the department to which the people are assigned. It is the department used in the chart string to charge a portion of the employee’s salary.*

*Employee home department is added to the .pdf and .csv output.*

### Running the Salary Distribution by Fund Report

1. Log in to PeopleSoft through the **EPM Login** [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal).

2. Navigation: **UVM Reports > Salary Distribution by Fund**

3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. For help, consult [General Information on Running Reports and Queries](#).

4. The parameters available for this report will populate.

![Process Request Parameters](image-url)
5. Enter criteria as appropriate:
   - **Role Name**: Preparer
   - **Planning Model ID**: UVM_20XX_BUDGET (XX = the fiscal year)
   - **Activity**: UVM_EMPLBD
   - **Scenario**: 20XXBUDGET (XX = the fiscal year)
   - **Departments(s)**: Choose one, multiple centers or check the box to include all.
   - **Version**: Select Version 1 from the drop down menu.

6. Specify **fund**, **purpose** or **project**. To use any of these options, click on the right-facing arrow next to the chart field to expand the area.

   ![Select Single or Multiple Values]

7. Use the magnifying glass to look up values or specify the by typing the value in the box. To add more than one code, click on the (+) **plus sign** at the right side of the row.

8. Click **Save** when finished.

9. Click **Run**.
10. The **Process Scheduler Request** page will appear. To run the report in PDF format, click on the first check box in the Process List and then click **OK**. To run the report in CSV format, for use in Excel, click on the second check box in the Process List and then click **OK**.

11. This returns the **Run Control Page**. Click on the **Process Monitor** link in the upper right corner of the screen to view the report. If help is needed with the Process Monitor, consult **General information on Running Reports and Queries**.

12. The report should now launch in a separate window.

**GF Long-Term Budget Summary Report**

The purpose of the report is to compare general fund long-term commitments to positions as identified on the Budget Roster and Positions in Other Areas reports, with salary and wage budgets as identified on the Budget Recap Report for fund 100. This report can be used as a reconciling tool when committing GF LT budget dollars to position budgets.

The report draws on position funding commitment and position FTE data stored in the Position Allowance Model (PAM), and budget information input into the fund 100 line item budgeting activity.

**Running the GF Long-Term Budget Summary Report**

1. Log in to PeopleSoft through the **EPM Login** [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal).

2. Navigation: **UVM Reports > GF Long-Term Budget Summary**
3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. For help, consult General Information on Running Reports and Queries.

4. The parameters available for this report will populate.

5. Input the criteria as appropriate.
   - **As of Date**: should be 07/01/20xx to agree with the first date in the new fiscal year.
   - **Planning Model ID**: UVM_20XX_BUDGET (XX = the fiscal year)
   - **Activity**: The fund 100 activity for your area (ex. ACAD1, ADMIN, SC2, etc.)
   - **Scenario**: 20XXBUDGET (XX = the fiscal year)
   - **Planning Center(s)**: Run the reports by individual planning center, provide a range of planning centers, or check the box to include all.
   - **Version**: Select Version 1 from the drop down box.
6. Click **Save** and then click **Run**.

7. This returns the Run Control Page. Click on the **Process Monitor** link in the upper right corner of the screen to view the report. If help is needed with the Process Monitor, consult **General information on Running Reports and Queries**.

**Interpreting the GF long-Term Budget Summary Report**

The report is divided into four sections:

1. **Salaried Positions**
   - Filled and unfilled position budgets for positions with a Job Function Code < 300 as identified on the **Budget Roster Report** and **Positions in Other Areas Report**. It totals only those commitments to the general fund, indicated as fund 100, long-term (source 000010) or fund 100, short-term (source 000012) in PAM.
   - Current G/F Base Budget is the sum of GF base budgets in E5010 through E5200, as indicated on the **Budget Recap Report** for fund 100.
   - Variance indicates whether GF base budgets are over-committed when compared to GF LT budgeted positions (negative variance), or if there are unassigned base budget dollars (positive variance).
   - The % base budget used must be <=100%.

2. **Wage Positions**
   - Filled and unfilled position budgets for positions with a Job Function Code >= 300 and <390 as identified on the **Budget Roster Report** and **Positions in Other Areas Report**. It totals only those commitments to the general fund, indicated as fund 100, long-term (source 000010) or fund 100, short-term (source 000012) in PAM.
   - Current G/F Base Budget is the sum of GF base budgets in E5300, as indicated on the **Budget Recap Report** for fund 100.
   - Variance indicates whether GF base budgets are over-committed when compared to GF LT budgeted positions (negative variance), or if there are unassigned base budget dollars (positive variance).
   - The % base budget used must be <=100%.
3. Other Positions

- Filled and unfilled position budgets for positions with a Job Function Code >390 as identified on the Budget Roster Report and Positions in Other Areas Report. It totals only those commitments to the general fund, indicated as fund 100, long-term (source 000010) or fund 100, short-term (source 000012) in PAM.

- Current G/F Base Budget is the sum of GF base budgets in E5390 through E5700, as indicated on the Budget Recap Report for fund 100.

- Variance indicates whether GF base budgets are over-committed when compared to GF LT budgeted positions (negative variance), or if there are unassigned base budget dollars (positive variance).

- The % base budget used must be <=100%.

4. All Positions

- A summary of the three previous sections. This compares the total of all filled and unfilled position budgets with a GF LT commitment to the total of all GF base salary and wage budgets in E5010 through E5700.

Budget Roster Report – (only used during Budget-Building period)

The budget roster report provides a listing of all filled and unfilled positions within a department. It displays current incumbent information as well as the funding commitment(s) that support the position. Because it is a budget roster, it draws new fiscal year salary data from UVM_EMPLBD and new FY position budget data from the Position Allowance Model (PAM).

The roster draws on position funding commitment and position FTE data stored in the Position Allowance Model (PAM), incumbent information uploaded from HCM - Job Data, and new FY salary data from UVM_EMPLBD.

Run this report to verify that employee salaries and associated position budgets have been updated with new fiscal year data. This is one of the required Green Reports. When finished with budget-building, save a copy of the output of this report in .pdf format to the shared drive designated to budget reports.

Refer to Explanation of Data in the Roster Report for a detailed description of output fields. The .csv output of the Budget Roster Report doesn’t include Alerts.

Running the Budget Roster Report

1. Log in to PeopleSoft through the EPM Login [link]

3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. For help, consult General Information on Running Reports and Queries.

4. The parameters available for this report will populate.
5. Input the criteria as appropriate.
   - **As of Date**: should be 07/01/20xx to agree with the first date in the new fiscal year.
   - **Planning Model ID**: UVM_20XX_BUDGET (XX = the fiscal year)
   - **Activity**: UVM_EMPLBD
   - **Scenario**: 20XXBUDGET (XX = the fiscal year)
   - **Planning Center(s)**: Run the report by individual planning center, provide a range of planning centers, or check the box to include all.
   - **Version**: Select from the drop down box

6. Click **Save** and then click **Run**.

7. The **Process Scheduler Request** page will populate.

![Process Scheduler Request](image)

8. Click **Ok**.

9. This returns the **Run Control Page**. Click on the **Process Monitor** link in the upper right corner of the screen to view the report. If help is needed with the Process Monitor, consult [General information on Running Reports and Queries](#).

**Roster Report**

The roster report is an ongoing management tool for maintaining position budgets. The roster report includes all filled and unfilled positions by department, organized by job function code. It provides employee information on filled positions, such as assignment FTE, term, and salary or annualized hourly rate. Position attributes are also displayed, such as position FTE, term and position budget, as well as the funding commitment(s) that support the position.
The roster report draws on position budget data maintained within the Position Allowance Model (PAM) as a part of Enterprise Performance Management (EPM), and incumbent information maintained in the Human Resources System.

Running the Roster Report

1. Log in to PeopleSoft through the EPM Login [www.uvm.edu/~erp/portal].


3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. For help setting up a Run Control ID, consult General Information on Running Reports and Queries.
4. The **Process Request Parameters** screen will display.

![Process Request Parameters Screen]

5. Set up parameters as appropriate:
   - **Role Name**: Always set as Preparer
   - **As of Date**: Use today’s date to report on the most recent data available.
   - **Planning Model ID, Activity, and Scenario**: POSALLOW20
   - **Version**: Always set as Version 1
   - **Planning Center(s)**: Click on the magnifying glass for a list of authorized departments. Click on Include All for a roster report that includes all departments on one report.

7. Click Run.

8. This returns the Run Control Page. Click on the Process Monitor link in the upper right corner of the screen to view the report. If help is needed with the Process Monitor, consult General information on Running Reports and Queries.

Explanation of Data in the Roster Report

- **Planning Center**: The home department to which a position is assigned to.
- **Job Function Code**: Natural groupings of positions based on contract type and similarity of work.
- **Position Pool #**: A five-digit number beginning with “NP” (NP_xxxxx) that identifies a grouping of pooled positions. The position tree number is followed by a pooled description. The description begins with the home department of the pooled positions, followed by the word “Pool” and a subsequent identifying phrase (ex. 30000_Pool-Provost).
- **Position #**: Identifies a University position within the HR System.
- **Business Unit (BusinessUnitHCM)**: Indicates HCM Business Unit of the position.
- **Job Code**: Indicates a Job code assigned to the position within the EMP PAM.
- **Position Title**: Refers to the job code titled assigned to the position within the EPM PAM system.
- **Union Code (PosUnionCd)**: For staff positions, the union code is position-driven based on work type (NU-Non Union, TM-Teamsters, UE-United Electrical). For faculty positions, the union code is employee-driven based on union standing (NU, U1-UA Full-Time, U2-UA Part-Time, U3-UA PT in Full-Time Union). The Union Code reflects the data in EPM PAM.
- **EmpId**: The employee id of the current employee filling the position.
- **Incumbent**: The name of the current employee filling the position. It will also indicate if the position is unfilled. For unfilled positions indicates prior incumbent name.
- **Employee Term (EmpTrm)**: Indicates the number of months the individual is normally employed during the year.
- **Emp FTE**: The FTE (full-time equivalency) for a particular employee assignment. Must be between 0.00 and 1.00.
- **Position Term**: The number of months during the normal work year that the position budget is based on. It may differ from the employee term as it represents the unit’s long-term budget plan for the position.

- **Position FTE**: The FTE (full-time equivalency) that the position budget is based on during the normal work year. It may differ from the employee assignment FTE as it represents the unit’s long-term budget plan for the position.

- **Fund Type**: Identifies the source(s) of funding for the position. Examples are fund 100 for General Funds, fund 150 for Income/Expense, and fund 300 for Grants/Contracts.

- **Funding Long-Term (L/T)**: The portion of the position FTE (0.00 to 1.00) identified as having a long-term funding commitment. This is often referred to as the “base budget” commitment when used in conjunction with general funds. A long-term commitment is a five year or greater plan.

- **Funding Short-Term (S/T)**: The portion of the position FTE (0.00 to 1.00) identified as having a short-term funding commitment. A short-term commitment is a year-to-year or term-of-contract plan.

- **Funding Department (FundingDepartment)**: Used to identify the department responsible for the funding of the position when a department other than the position’s home department manages the dollars.

- **Program (Prog)**: Used infrequently to indicate a few special areas of funding support. Valid values all begin with B.

<table>
<thead>
<tr>
<th>B104</th>
<th>BO-Admin Svcs Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>B106</td>
<td>BO-AG Experiment Station</td>
</tr>
<tr>
<td>B107</td>
<td>BO-Extension</td>
</tr>
<tr>
<td>B108</td>
<td>BO-McStennis</td>
</tr>
<tr>
<td>B109</td>
<td>BO-AG Related Services</td>
</tr>
<tr>
<td>B115</td>
<td>BO-Academic Commitments</td>
</tr>
<tr>
<td>B350</td>
<td>BO-Integrated Biology</td>
</tr>
</tbody>
</table>

- **Position Long-Term (PosLTSal) Salary**: The dollar amount of long-term funding support to the position’s budget.

- **Employee Salary**: The salary or annualized hourly rate applicable to the incumbent’s assignment salary with in the HCM during the normal work year. If an individual occupies more than one position then each position will have an assignment salary.
- **Position Salary (PosSalary)**: The total of all funding commitments (long-term and short-term) that make up the position budget.

- **Alerts**: Indicates any discrepancies between position’s data in HCM and EPM PAM.

- **ONLY FOR THE CSV output** – use column AC – AS to provide position data updates, such as salary, fte, job code, funding department, position salary distributions, etc.

### Positions in Other Areas Report

The Positions in Other Areas report is a variation of the Budget Roster Report. The purpose of the report is to give business managers an overview of all the positions they support financially that are not in their departments. Each position is shown, whether filled or not, along with funding information. This data allows the business manager to do long-term position and staffing planning.

The report draws on position funding commitment and position FTE data stored in the Position Allowance Model (PAM), and incumbent information from HCM - Job Data.

### Running the Positions in Other Areas Report

1. Log in to PeopleSoft through the EPM Login [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal).

2. Navigation: **UVM Reports** > **Positions in Other Areas**

3. The **Run Control ID** screen will populate. Enter an existing Run Control ID or create a new one. For help setting up a Run Control ID, consult [General Information on Running Reports and Queries](#).
4. The **Process Request Parameters** screen will display.

![Process Request Parameters](image)

5. Select the criteria as shown.
   - **Role Name**: Preparer
   - **As of Date**: should be 07/01/20xx to agree with the first date in the new fiscal year.
   - **Planning Model ID**: UVM_20XX_BUDGET (XX = the fiscal year)
   - **Activity**: The fund 100 activity for your area (ex. ACAD1, ADMIN, SC2, etc.)
   - **Scenario**: 20XXBUDGET (XX = the fiscal year)
   - **Planning Center(s)**: Run the report by individual planning center, provide a range of planning centers, or check the box to include all.
   - **Version**: Select from the drop down box
6. Click Run.

7. This returns the Run Control Page. Click on the Process Monitor link in the upper right corner of the screen to view the report. If help is needed with the Process Monitor, consult General information on Running Reports and Queries.

Diagnostic Reports

A series of diagnostic reports have been created. These reports will help verify many elements of the budget submission. There are six reports that will look for the following data elements:

- Invalid Combo Codes
- Missing Chart Field Values
- Distributions vs. Budgets Created
- Distributions to Expired/Closed Projects
- Less than 100% Distribution
- Distributions to Suspense Salary Account 58100

1. Log in to PeopleSoft through the EPM Login www.uvm.edu/~erp/portal/.

2. Navigation: UVM Reports > Budget Planning Diagnostics

3. The Run Control ID screen will populate. Enter an existing Run Control ID or create a new one. For help, consult General Information on Running Reports and Queries.
4. The parameters available for this report will populate.

5. Select the criteria as appropriate.
   - **As of Date**: Should be 07/01/20xx to agree with the first date in the new fiscal year.
   - **Planning Model ID**: UVM_20XX_BUDGET (XX = the fiscal year)
   - **Activity**: UVM_EMPLBD
   - **Scenario**: 20XXBUDGET (XX = the fiscal year)
   - **Planning Center**: Run by individual planning center or check the box to include all.
   - **Budget Version**: Select from the drop down menu
6. Select Diagnostics. Setting up criteria to run all diagnostic reports at once is recommended. Select the Diagnostics Type using the magnifying glass. Click on (+) plus sign to add rows as desired.

![Diagnostics Table]

- The diagnostics will pinpoint areas for further review and correction. Each report will indicate the diagnostic report that the output is based on.
- If there is no output for a particular diagnostic (meaning no errors were found), the report will also indicate that no data was found.

7. Click Save when finished.

8. Click Run.

9. This returns the Run Control Page. Click on the Process Monitor link in the upper right corner of the screen to view the report. If help is needed with the Process Monitor, consult General information on Running Reports and Queries.

**Report Content**

- The diagnostics will pinpoint areas for further review and correction. Each report will indicate the diagnostic report that the output is based on.
- If there is no output for a particular diagnostic (meaning no errors were found), the report will also indicate that no data was found.

**Save a Search**

These instructions detail the steps to save search criteria for the various activities that will be performed when building a new fiscal year budget.

1. Log in to PeopleSoft through the **EPM Login** [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal).
2. Navigation: Planning and Budgeting > Activity Preparation > My Planning Workspace

3. The My Planning Workspace screen will open.

4. Enter search criteria and then click on the Save Search Criteria link.

5. The Save Search As screen will open. Type a name for the search that is distinguishable from other saved searches and click Save.

6. Click on Return to Advanced Search.
Delete Saved Searches from Previous Years

These instructions detail the steps to delete saved criteria from the previous year. Returning budget users will need to perform these steps prior to creating a new search.

**Note:** The Position Allowance Model (POSALLOW20) is not tied to a specific fiscal year. The same search criteria for this activity can be used each year. It is not necessary to delete.

1. Log in to PeopleSoft through the EPM Login [www.uvm.edu/~erp/portal](http://www.uvm.edu/~erp/portal).

2. Navigation: Planning and Budgeting> Activity Preparation> My Planning Workspace

3. The **My Planning Workspace** screen will open.

4. Click on **Delete Saved Search**.

5. A list of saved searches will appear. Click on the search that should be deleted and then, click **Delete**. Repeat until all prior year searches have been deleted.
Delete Saved Searches

Select the searches to be deleted, then click Delete.

My Saved Search
- test 2

6. Click on the **Return to Advanced Search** link to return to the Workspace Search screen.
Personalize the Chart Field Order in Employee Budgeting

These steps detail how to personalize the order of chart fields for salary distributions in the employee budgeting activity.

1. Follow steps 1-6 in Start Here

2. On MY Planning Workspace choose UVM_EMPLBD activity.

3. The Position Overview page provides the main menu used to access employee budgeting pages in which one can manage, adjust, terminate, analyze or inquire on employee assignment data.

4. Select the following options with the Search and Filter Options section and click Search.

5. Click on the name of any employee.

6. Click on the Details tab.

7. Click on the amount in the Salary column for the Effective Date of 07/01/xxxx.

8. In the Distribution box, click on the Customize link.
9. The **Personalize Colum and Sort Order** screen will appear.

10. Click on the name of the field to be moved. Use the up and down arrows to the right of the box to move the selected field to its new location in the chart string. Continue until all chart fields are ordered in the desired way.

11. Click **OK**.

12. All salary distributions will now be arranged in this order.

13. Select **Position Overview** when finished.
Helpful Links

Relevant UVM Departments

- Financial Analysis & Budgeting
- University Financial Services

Related Policy

- Accounting, Budgeting, and Travel Policies
- Position Management & Recruitment Materials

This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.