Anaplan Budget Turn Around (BTA) User Manual

If you are having any problems with Anaplan access (for example, not seeing the data you would expect to see or seeing data you think you should not be seeing, adding/removing users, users changing assignments), please contact Decision Support & Analysis at <u>decisionsupport@udel.edu</u>. Any BTA or budget specific questions or comments can be directed to your budget office analyst or to <u>wf-budgetofficebta@udel.edu</u>

Navigation Pane

To see a "hyperlinked" Table of Contents for this document, open the Navigation Pane in Word by pressing Ctrl+F and select "Headings"



Logging into Anaplan

- 1. Access the Anaplan application using any browser: <u>https://us1a.app.anaplan.com/home</u>
- 2. Click on the "Log in with Single Sign-on (SSO)" link and sign-in using the Central Authentication Service (CAS).

	/tnapl	an Live!
Email address	Watch Ar sessions	naplan Live! on demand
Password	Wat	Ich now
orgot Password? Need help signing in?		
Continue	Discover Anaplan	
	Community	Blog
Log in with Single Sign-on (SSO)	Connect with Anaplan users, find answers, and share solutions.	How to make your sales compensation plans attractive and fair.
	Give feedback	Video
	Help guide the next wave of Anaplan: Sign up for our user research program!	Better workforce plans save lives at South Central Ambulance Service.

- 3. Once logged in, you will see your '**Home'** screen. You should see a blue title bar with a "Welcome, [Your Name]" displayed, as well as a list of available Apps and Pages.
- 4. Click the dropdown arrow for **Apps** then click on "**Budget Turn Around BTA**". You should then see a list of categories and pages within the App.

Anaplan User Interface

Log in with Single Sign-on

Continue

Log in with email address

Email address

The Anaplan UI (user interface) is primarily made of Apps, Pages, and Cards.

1. **Apps** – Collection of related Pages. An App can have many pages. You will see pages listed according to your permission settings.

	~ .	Apps						
Nai		ne Description						
C	::	Budget Turn Around (BTA)						
	::	Long Range Planning						
	•	Long Range Planning UAT Testing						
	::	PROD - Long Range Planning						
	::	SR HIGHER ED-AGILE APP (PROJECT MANAGEMENT)						
		UDBM - Budget Model						

2. **Pages** – Designed for BTA activities. A page is made up of many cards. Pages may also be called dashboards.

🔥 Apps 👻	Budget Turn Around (BTA) 🔹	University Of Delaware 👻 🔍
QUICK ACCESS	e	Import dashboard
	> Most recent	
CATEGORIES	+ > 0. Landing Pages 🖉 🗇	
0. Landing Pages	2 ii	
1. Data	1 v 1. Data	
2. Model Administration	s 🛱 4.01 Position Data	
2a. Preparer Admin Inputs	3 2. Model Administration	
3. Budgeting	8 2.1 Version Management	
4. Position	7 ID 2.2 Position and Other Labor Account Selection	
Planning	2.3 Current Position Effective Date and Merit Drivers	
5. Other Labor	5 2.4 Admin DCA Management	
7. Budget Office Inputs	0 2.5 Vacancy Data Effective Date	
8. Reporting	⁷ ∨ 2a. Preparer Admin Inputs	
9.1a Exception Reporting	4 80 2.1a Budget Baseline Selection	
Uncategorized	3 2.2a Create New Purpose - Account Combinations 🖉	
	80 2.3a Budgeting and Labor Approvals	

3. **Cards** – There are usually many cards on a page. A card is designed to display data in the best way for you to carry out your work.

Tip: Once you make a BTA page selection, a quick way to navigate to the various categories and pages within the categories is by selecting the down arrow at the top of the page (see below).

Apps v Budget Turn Around (BTA) v 4. Position Planning / 4.1 Current Position	tion Planning
 4.1 Current Position Planning I 	
ELAWARE.	Current Position Planning

Apps 🗸 Budget Turn Around (B	TA) V 4. Position Planning / 4.1 Curre	ent Position	Planning
4.1 Current Position Planning 🗘 •	Recents	>	
ТЪ	Favorites	>	
	0. Data & Data Exception Dashb	oards >	
D	1. Model Administration	>	
	2. General Preparer Inputs	>	
Click Here	3. Budgeting	> -	
CICK HELE	4. Position Planning	>	4.1 Current Position Planning
	5. Other Labor	>	4.1a Add New Distribution
	6. Submissions	>	4.1b Position Planning Details
	7. Budget Office Inputs	>	4.2 Vacancy Planning
	8. Reporting	>	4.2a Add New Vacancy Distribution
Home vs Shared Position Pay	Landing Pages	>	4.3 New Position Planning
	Uncategorized	>	4.4 CBO Export - Current Position Planning
Home Dept Salary			

Anaplan Roles/Permissions

Every user in Anaplan is assigned a user role (or user permission type). See the below. Any questions about your role should be directed to <u>decisionsupport@udel.edu</u>

Anaplan Permission Type Information

The University's Budget Turn Around (BTA) Access Type is a set of permissions that allow users to access and manage budget data in the BTA model. The following are the different permission levels and their descriptions:

Full Access	Users with Full Access have the highest level of permissions in the BTA system. They can view, edit, and approve all budget data, including department budgets, college budgets, and the university-wide budget. They can also create and manage users and roles.
Model Admin	Model Admins are responsible for managing the budget model and ensuring that it is accurate and up-to-date. They can create and edit budget scenarios, set budget parameters, and generate budget reports.
Budget Office + Preparer	Budget Office + Preparers are responsible for preparing and submitting department budgets to the Budget Office for review and approval. They can view, edit, and submit department budget data.
Dean/VP Approver	Dean/VP Approvers are responsible for reviewing and approving department budgets. They can view and approve department budget data, as well as make changes to the budget data if necessary.
CBO Approver + Preparer	CBO Approver + Preparers are responsible for preparing and submitting college budgets to the Chief Budget Officer (CBO) for review and approval. They can view, edit, and submit college budget data.
CBO Reviewer + Approver (everything, including Dean apprv)	CBO Reviewer + Approvers are responsible for reviewing and approving college budgets, as well as department budgets that have been approved by the Dean/VP. They can view, edit, and approve all budget data, including department budget data, college budget data, and the university-wide budget.
Department Preparer	Department Preparers are responsible for preparing and submitting department budgets to their Dean/VP for approval. They can view, edit, and submit department budget data.
Department Preparer - No Position Planning	Department Preparers - No Position Planning are responsible for preparing and submitting department budgets to their Dean/VP for approval, but they do not have access to position planning data. They can view, edit, and submit department budget data, but they cannot view or edit position planning data.

https://services.udel.edu/TDClient/32/Portal/KB/ArticleDet?ID=1059

Where do I start?

A good place to start reviewing your area's budgets are by running reports listed under the "<u>8.</u> <u>Reporting</u>" category for your College/Unit or Department. Many of the reports that have been created in Anaplan are like the reports that were previously available in Axiom.

3. Budgeting

The pages under "3. Budgeting" are where the non-compensation related expenses are input. There is a separate section "5. Other Labor" for other labor like S-Contracts.

Recents	>	
Favorites	>	
0. Data & Data Exce	eption Dashboards >	FY22
1. Model Administra	tion >	* 0
2. General Preparer	r Inputs >	\$ 1,000
3. Budgeting	>	Calculation Engine Overview
4. Position Planning	,	3.2 Calculation Engine Drivers
5. Other Labor	>	3.3 Manual Growth Rate Review
6. Submissions	>	3.4 Manual Dollar Input
7. Budget Office Inp	outs >	3.5 Multiple Line Input
8. Reporting	>	3.6 Create New Purpose - Account Combination

3.1 Calculation Engine Overview

3.1 is a dashboard to review budgeting data. No input is done here. 3.1 gives you a view of all the historic budget & actuals data for the selected College/Unit or Department. It might be useful to have this tab open, and then work on a separate tab (i.e. <u>3.4</u>) and refresh 3.1 as updates are made. Different time periods can be selected on the time filter. To streamline the viewing of the data, the "Suppress Zeros" checkbox removes lines that equal zero (based on the selections under the Time Filter).

< 3.1	Calculation Engine Overview 🗘 🔩 🛧 FY25 Budget 🗸	Final Amount 🗸	Reset D	Additional insights			
Q Find	4) [≇ Ÿ î↓ ⊚ Щ ≣⊨ [], …		I Time Filter			
		FY24	FY25		Years	Source	
ST	HS212124 & 140000 - BUDGETING ONLY-SUPPLIES & EXP & OP	\$ 832,000	\$ 832,000	FY17		ACTUALS	
STI	HS212124 & 150000 - BUDGETING ONLY-OCCUP & MAINT & OP	\$ 375,000	\$ 375,000	FY18		ACTUALS	
ST	HS212126 & 140000 - BUDGETING ONLY-SUPPLIES & EXP & OP	\$ 25,200	\$ 25,200	FY19		ACTUALS	
ST	HS212126 & 150000 - BUDGETING ONLY-OCCUP & MAINT & OP	\$ 216,000	\$ 216,000	FY20		ACTUALS	
ST	HS212126 & 190800 - MISC INTER-DEPARTMENTAL CREDIT & OP	-\$ 2,500	-\$ 2,500	FY21		ACTUALS	
ST	HS212127 & 140000 - BUDGETING ONLY-SUPPLIES & EXP & OP	\$ 3,300	\$ 3,300	FY22		ACTUALS	
ST	HS212128 & 140000 - BUDGETING ONLY-SUPPLIES & EXP & OP	\$ 75,000	\$ 75,000	FY23		ACTUALS	
ST	HS212128 & 190800 - MISC INTER-DEPARTMENTAL CREDIT & OP	-\$ 2,700	-\$ 2,700	FY24	*	PREVIOUS BUDGET	
				FY25	~	CURRENT BUDGET	

Filters

Suppress Zeros (Based on I	Fina	al Am
College / Unit		
STUDENT LIFE	×	~
Sub-Unit		
STUDENT WELLBEING	×	~
Department		
08101-STUDENT HEALTH SER	×	~
Budget Purpose		
Find		~
Driver Method		
Find		~
Financial Statement Line Item		
SUPPLIES MATERIAL & PURC	×	~
Sub-category		
Find		~
GL Account		
Find		~
Fund Type Category		
Self Supporting	×	~

3.2 Calculation Engine Drivers

3.2 lists the driver methods that the budget office initially set up for the Other Labor purpose & account combinations. The user can override these selections, if applicable.

In this section you can set the Budgeting line-item drivers at various levels (Line Item, Sub-Category, or GL Level.) The driver methods for each different account are what will ultimately drive the development of your budget. This is done at a Purpose - Account concatenation level. These concatenations will be prepopulated by an account level driver selection made by the budget office. If you want to review the driver methods selected for your unit, you may do so at the bottom of the grid.

Note that you can sync the lower levels of the account hierarchy by clicking on a row header. This will filter the grids below to only show the children of the selected item.

Financial Statement Line Item		Sub-category		GLAccount			
rinu	*	PIRG.		* Pillu			•
College Unit	Department		Budget Purpose			Purpose - Account	
Find_ ~	00101-OFC OF THE PR	ESIDENT X V	Find		~	Find	~
Driver Method	Fund Type Category		Fund (Op/NonOp)				
Find	Find	~	Find		~		
		GL Account Driver	Driver Method	Override		Final Driver Method	
PRES110000 & 133601 - DOMESTIC TRAVEL-AIRFARE & OP	\$ Input					\$ Input	
PRES110000 & 133602 - DOMESTIC TRAVEL-LODGING & OP	\$ Input					\$ Input	
PRES110000 & 133603 - DOMESTIC TRAVEL-MEALS & OP	\$ Input					\$ Input	
PRES110000 & 133604 - DOMESTIC TRAVEL-GROUND TRANS & OP	\$ Input					\$ Input	
PRES110000 & 133704 - INTERNATIONAL TRAVEL-GRND TRAN & OP	\$ Input					\$ Input	
PRES110000 & 137500 - EMPLOYEE RECRUITING TRAVEL & OP	\$ Input				\$ Input		
PRES110000 & 137600 - MOVING & OP	\$ Input					\$ Input	
PRES110000 & 140000 - BUDGETING ONLY-SUPPLIES & EXP & OP	\$ Input					\$ Input	
PRES110000 & 140102 - ATHLETIC APPAREL & OP	\$ Input					\$ Input	
PRES110000 & 140140 - STUDENT CENTER EXPENSE & OP	\$ Input					\$ Input	

3.3 Manual Growth Rate Review

If you input a manual growth rate for any budgeting items, you should be able to see those listed here.

3.3 Manual Growth R	ate Review Ф ≺ ☆		FY24 Budget v Reset							
ELAWARE.		Manual Growth Rate Review	7.02 Calculation Engine Drivers >							
Support Email										
Click Here										
In this deshboard you can override at a child level for If the % Growth Overrido' overridden. In this case the Note that you can sync the The % Final Growth' colum	In this dashboard you can set the growth rates for each account which will ultimately due the development of your budget for those accounts for which you selected the % Growth drives. Setting a growth rate at a parent level will automatically populate all children with that rate, you can the override call and the set of the setting a growth rate at a parent level will automatically populate all children with that rate, you can the actual level for any acceptions. This allows you to make as title inputs as possible, and not have to make the inputs GL account. By GL account. By GL account. By GL account the walk will not be applied. If the % Final Growth column is highlighted yellow, that means that a child of that account has been overrided. In this case there is no issue, it is us in indicator. Note that a child of that account has been on the that on only the base is the inputs of the account here based to only show the children of the selected item. The % Final Growth column in the gold is what the model with ultimately use to calculate the budget you are developing for the upcoming fiscal year.									
Growth Drivers by Financi	al Statement Accounts									
		% Growth								
SUPPLIES MATERIAL & P			0%							
SALARIES AND WAGES			0%							
EMPLOYEE BENEFIT EXP			0%							
TRAVEL			0%							
DEBT SERVICE			0%							
TUITION & FEES			0%							
CONTRACT & OTH EXCH			0%							

In this dashboard you can set the growth rates for each account which will ultimately drive the development of your budget for those accounts for which you selected the '% Growth' driver. Setting a growth rate at a parent level will automatically populate all children with that rate, you

can then override at a child level for any exceptions. This allows you to make as little inputs as possible, and not have to make the inputs GL account by GL account.

If the '% Growth Override' column in the grid below is highlighted orange, this means you have entered a % but not checked the override column next to it meaning that value will not be applied. If the '% Final Growth' column is highlighted yellow, that means that a child of that account has been overridden. In this case there is no issue, it is just an indicator.

Note that you can sync the lower levels of the account hierarchy by clicking on a row header. This will filter the grids below to only show the children of the selected item.

The '% Final Growth' column in the bottom grid is what the model with ultimately use to calculate the budget you are developing for the upcoming fiscal year.

3.4 Manual Dollar Input

The 3.4 dashboard is the primary area for manually inputting the non-compensation expenses. The initial value (or baseline) is initially set by the Budget Office. To change the amount, you need to click on the checkbox in the "Override?" column, then type in the amount in the "Manual \$ Input" column. **Both steps must be done in order to update the amount.**

< 🛛 3.4 Manual Dollar Input 💠 式 🛧						FY24 Budget Reset 🗊	
	,						
College Unit	Department		Budget Purpose		Driver Method		
Find V	00101-OFC OF THE PRESIDENT	x ~	Find	~	Find	~	
Financial Statement Line Item	Sub-category		GL Account		Fund Type Category		
Find V	Find	~	Find	~	V Find		
Fund (Op/NonOp)	Purpose - Account						
Find V	Find	~	Suppress Zeros (Based on Manua	al Input)			
Manual Dollar Input							
				FY24			
	Department	Initial Value (Baseline)	Override?	Manual \$ Input	\$ Input Final	Comments	
PRES110000 & 130000 - BUDGETING ONLY-TRAVEL & TRANSP & OP	00101-OFC OF THE PRESIDENT	12,788		\$0	12,788		
PRESTI0000 & 130100 - CONFERENCES & TRAINING MEETING & OP	00101-OFC OF THE PRESIDENT	0		\$0	0		
PRES110000 & 130400 - TRANSPORTATION SERVICES CHARGE & OP	00101-OFC OF THE PRESIDENT	0		\$0	0		
DESMOOD & 120500 - EODEION TRAVEL & OD	00101-OEC OF THE PRESIDENT	0		\$0	0		

3.5 Multiple Line Input

This dashboard is where you would see the usage of "multiple line item" drivers (i.e. if you wanted to do a growth rate plus some fixed amount). Most departments will probably not use 3.5.

< 3.5 Multiple Line Input 🗘 < 🛧										FY24 Budge	et v Reset	Ε,
H ELAWARI	DELAWARE.			Multiple Line Input			3.1 Calcu	3.1 Calculation Engine Overview >				
Support Email		A										
Click Here		-										
On this dashboard you can apply multiple driver methods to each Purpose - Account line. The sum total of the result of each of the driver methods will be applied in the Calculation Engine Dashboard in the year you are developing a budget for. Note that you will need to apply the "Multiple Line Input" driver method to the Purpose - Account line in the driver selection dashboard for the output of this dashboard to make it into your budget. Additionally, if you have selected the "Multiple Line Input" driver but have not input anything for that line in this dashboard, the model will pull in zero to your budget. The grid below has a couple filters applied to it. The first is the result of all of your selections made in the box below. The second is that if the Purpose - Account line does not have the "Multiple Line Input" driver method selected, it will be filtered out of the grid below.												
College Unit	Dep	artment			Budget Purpose			F	inancial Statement Line Item			
Find	~ 0	0101-OFC OF THE PRESIDE	NT	× ~	Find			~	Find			~
Sub-category	GL A	Account			Fund Type Catego	ry		F	Fund (Op/NonOp)			
Find	¥ FI	nd		~	Find			~	Find			~
Purpose - Account Find												
Manual Input by Line												

3.6 Create New Purpose – Account Combinations

This area is where you can create new purpose code – account combinations. This would be where you want to budget on a PeopleSoft account in a particular purpose code, but that purpose code/account combination is not visible.

Input the needed fields for your new combination in the grid. Once you are finished, check the 'Create?' checkbox. The error indicator to the right of the grid will indicate if there are any issues with your inputs.

Once all errors have been rectified, click the "Create New Purpose – Account Combo" button to create your new combination. Note: You will need to refresh the page where you want to view the new purpose-account combo.

< 3.6 Create New Purpose - Accourt	nt Combinations 💠 < 🛧						
U NIVERSI ELAW	TYOF ARE.	Create Purpose - Account Combinations					
Support Email Click Here							
Input the needed fields for your new con right of the grid will indicate if there are a	nbination in the grid below. Once yo any issues with your inputs.	u are finished, check the 'Create?'	box. The error indicator to the	3.1 Calculation Engine Overview >			
Once all errors have been rectified, click	the button to the right to create you	r new combination.		5.1 Other Labor Calculation Engine	e>		
					21. Create New Purpos	e - Account Combinati	
Select Department (Do First!)	Purpose Code	Account	Fund Type	Fund Type (Op/Non-Op) from Budget Rollup	Fund Type (Op/Non-Op) Override	Final Fund Type (Op/Non-Op)	Create?
~							

4. Position Planning

The pages under Section 4 are where the position data is updated, including separate selections for filling vacancies and creating new positions.

4.1 Current Position Planning

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College / Unit Sub-Unit Department Employee Find_ Find_ Find_ Current Positions Salary Plan	Shared Position Fringe Benefits					02150-ANIMAL AND FO		
College / Unit Sub-Unit Department Employee Find			Hom	e Dept Salary: \$ 422,334,866 (79.9%)		02160-ENTOMOLOGY &		
College / Unit Sub-Unit Department Employee Find. Find. Find. Find. Find.						02170-PLANT & SOIL SCI		
Find. v Find. v Find. v Current Positions Salary Plan Find. v Find. v	College / Unit	Sub-Unit		Department		Employee		
Current Positions Salary Plan Find	Find	Find	~	Find	~	Find		~
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	Find	 Find 	~					

4.1 is where changes are made to existing positions. This position data is downloaded from HR at the beginning of the BTA process. Things that can be changed here include:

- 1) FTE
- 2) Salary
- 3) Merit
- 4) Other Increases
- 5) Admin Supplements and 1/9th
- 6) Distributions (purpose code/account/class) for Base Salary, Admin and 1/9th
- 7) Specific dates for salary changes

Note: These changes are only for BTA budget planning. The changes will not flow back to HR (i.e. LAM changes).

Under the filter selection, select the College/Unit you want to work on. You can sort by the various columns like Position ID, Position type or Salary.

Tip: To delete a date from a date cell, you can press "Delete" on your keyboard. You might need to wait a few seconds before it takes effect.

Tip: If you want to change a distribution, but that distribution only has one line (i.e. equals 100%), you will first have to go to 4.1a to add a new distribution. Once you do that, you can

navigate back to 4.1 (refresh the page) and you will see the new distribution for that position and will be able to click the box(es) for "Override Distribution?" and enter the new distribution percentage(s).

Tip: For faculty salaries or for academic positions where the merit increase is typically 9/1, Anaplan assumes that any distribution changes will also take effect 9/1. If the distribution change needs to be in effect on 7/1, you need to put 7/1 in the "Distribution Override Effective Date".

Position Type	Salary	End Date	Rank/Retention/S Faculty/Promotio Effective Date	Distribution Override Effective Date
Center Director	\$ 200,530			7/1/23 🛅

4.1a Add a New Distribution

If you want to add a new distribution for a position, whether it is for base salary, admin supplement or a 1/9th, you will enter it under 4.1a. Enter the data as shown in the fields below. Make sure you read the pink "Error Message" box at the right for any potential input errors. Select the checkbox for "Create Distribution" and click on the "Create a New Distribution" button. When you navigate back to 4.1, you should be able to see what you just created (after refreshing).

Ψ	INIVERSET TOP				Add New Position	Distribution	
	ELAWARE.			,	add New Position	Distribution	
L	-						
pport Email		Î					
ck Here		•					
Current Position Planni	ing >						
out the fields below and	d check the 'Create New Distribu	tion?' box. When the "Error Messag	e' cell on the right indicates that y	ou are ready to create the	new distribution, click the button the	the right. You can then use	
link in the top left of this	is box to navigate back to the po	sition planning dashboard.					
							Create New Distribution
Employee	Earnings Code	Budget Purpose	Account	Class	Class for PeopleSoft	Create Distribution?	Error Message
							Please fill out all fields
							Please fill out all fields Please fill out all fields
Current Position Pl	lanning >						Please fill out all fields Please fill out all fields
Current Position Pl out the fields below k the button the the	lanning > w and check the 'Create N e right. You can then use t	iew Distribution?' box. When	n the "Error Message' cell 5 box to navigate back to t	on the right indicates	that you are ready to create ashboard.	the new distribution,	Pease El out al fields Pease El out al fields Create Near Distribution
Current Position Pl out the fields below c the button the the Employee	Ianning > w and check the 'Create N e right. You can then use t Eamings Code	lew Distribution?' box. When the link in the top left of this Budget Purpose	n the "Error Message' cell s box to navigate back to th Account	on the right indicates he position planning o Class	that you are ready to create ashboard. Class Lookup	the new distribution,	Pesso El out al fields Pesso El out al fields Create New Distribution Error Mossage
Current Position PI but the fields below the button the the Employee k Seifert	Ianning > w and check the 'Create N e right. You can then use I Earnings Code Admin	iew Distribution?' box. When the link in the top left of this Budget Purpose OHSA110000-ENVIRONM	n the "Error Message' cell s box to navigate back to th Account 120210 - PROF F/T ADMN	on the right indicates he position planning o Class 908	that you are ready to create asshboard. Class Lookup 008	Create Distribution?	Peace Struct all fields Peace Struct all fields Creete Nsign Distribution Error Message Your new distribution is ready to be created
Current Position Pl out the fields below k the button the the Employee rk Seifert rk Seifert	Ianning > w and check the 'Greate N eright. You can then use I Eamings Code Admin 1/9th	lew Distribution?' box. When the link in the top left of this Budget Purpose OHSA110000-ENVIRONM OHSA110000-ENVIRONM	n the "Error Message" cell box to navigate back to th Account 120210 - PROF F/T ADMN 120210 - PROF F/T ADMN	on the right indicates he position planning of Class 908 808	that you are ready to create dashboard. Class Lookup 008 008	the new distribution,	Please ST out all fields Please ST out all fields Create Near Distribution Error Message Your new distribution is ready to be created Your new distribution is ready to be created

4.2 Vacancy Planning

4.2 will show any vacant positions that were imported into Anaplan from HR for the selected College/Unit or Department. If you want to include them for budgeting, click on the checkbox for "Include?" next to each position. Scroll further down to select the "Override Salary"?" checkbox for each position and input the salary dollars in the "Salary Override Amount" field (make sure to do both actions). Lastly, update the distribution percentages. If a new distribution is necessary, that must be done in 4.2a

< 4.2 Vacancy Planning 🖞 🔩 🕁										FY24 Budget 🗸	Reset 😨 ·
Vacancy Home Dept Salary Vacancy Home Dept Fringe Benefits Vacancy Shared Position Salary Vacancy Shared Position Fringe Benefits	Itomo Dept Salary Itomo Dept Salary Vacancy Homo Dept Salary 1 0 (0.00) Vacancy Homo Dept Fringe Reeffers 1 0 (0.00) Amed Position Salary Amed Position Fringe Reeffers							00101-OFC OF THE PRES	Submitted	?	
This dashboard lets users adjust their vacant positions details to produce a budget in the upcoming fiscal year. Users can adjust start dates, choose to exclude, and override salaries and distributions for each position. Check "Includer" to Vacancy Branning details The checkbox and "Vacancy Start Date" will be yellow if no date is entered. The user may enter in a contract period to the "existing" adjust to see a 19th calculation. Add a contract period to the "existing" table to see a 19th salary if applicable											
College / Unit			Department					Open Positions			
Find		~	00101-OFC OF	THE PRESIDENT			× ~	Find			~
Position Attribute Input											
	Include?	Class	Contract Type	Contract Type Override	Contract Type Final	Default Start	Vacancy Start Date	Distribution Override Effective Date	Period REG Vacancies	ADM Vacancies	1/9th Vacancies
Administrative Specialist (10003144) in Dept. 00101		004	Fiscal		Fiscal	Jul 23			1	0	0
00101-OFC OF THE PRESIDENT											

Continuing down the page are separate sections where you can override (i.e. update) the Base, Admin or 1/9th salary (if applicable).

< 4.2 Vacancy Planning	\$ < ±			FY24 Budget 🗸 Reset 🕞
Position Base Salary				~
	Base Salary	Override Salary?	Salary Override Amount	Final Salary
Administrative Specialist (L\$:0	\$0	\$0
00101-OFC OF THE PRESID	S	0		\$0
Position Admin Salary				
rostorradinirodiary				
	Base Salary	Override Salary?	Selary Override Amount	Final Salary
Faculty 1/9th				
	Faculty or Staff?	Initial 1/9th Salary	Final 1/9th Salary (Aftor Base Salary Overrides)	1/9th Effective Month

4.2a Add New Vacancy Distribution

This works similar to <u>4.1a</u> but it is used when a vacant position being included for budgeting needs a different purpose code / account / class.

< 🛛 4.2a Add New Vacancy Distribution 🗘 🔩 🛧

U NIVER ELA	RSITY OF WARE.	Add New Vacancy Distribution						
Support Email								
4.2 Vacancy Planning Fill out the fields belo that you are ready to to navigate back to th	w and check the 'Crea create the new distribu e position planning da	ite Vacancy Distribution ution, click the button o ishboard.	n?' box. When the 'Errc on the right. You can th	or Message' cell on the	ne right indicates e top left of this box	Create Vacancy Distribution		
Position	Earnings Code	Budget Purpose	Account	Class	Create Distribution?	Error Message		
						Please fill out all fields		
						Please fill out all fields		

4.3 New Position Planning

4.3 is where an entirely new position can be created.

Step 1 is to fill out the details for each position being created. Make sure to check the box for "Create Position?".

Step Fill in th	1: e details in the grid below for each new position	י you are creating. When you are done, make s	sure to check the 'Create Position' box. If there	${\bf \dot{s}}$ is an error with your inputs then the 'Error N	Aessage' column will highlight red and give you the reason the row is not ready to create a position for.
	Department	Position Name	Salary Plan	Create Position?	Error Message
1	~				Please fill out all fields
2					Please fill out all fields
3					Please fill out all fields
4					Please fill out all fields
5					Please fill out all fields
6					Please fill out all fields
7					Please fill out all fields
8					Please fill out all fields
9					Please fill out all fields
10					Please fill out all fields

Step 2: Click on the "Create New Positions" button



Step 3: Insert salary, start date, and any comments

Step 3 Insert position level details in the grid below.			
	Selary	Start Date	New Position Comments

Step 4: Input the distribution details

Please fill out all fields

Step 4 Input all of your splits for created distributions for	or each new position in the s	grid below. The error mess ribution incorrectly, please	age on the right will indicate i contact the model admin for a	f you're missing assistance (they	anything. will be ab	The grid below will only sh le to delete the distribution	iow new positions for which you have no).
					\$ Q	ਲ਼ਫ਼ੵ∜๏₂"ঢ়᠃	
	Purpose Code	Account	Class	Distribution %		Create Distribution?	Error Message
	OHSA110000-ENVIRONME	120200 - PROFESSIONAL S	015 🗸	6	0.0%		Your split does not sum to 100%
New position				10	0.0%		Please fill in all required fields.
					0.0%		Please fill in all required fields.
4150-ENVIRONMENTA							

Step 5: Click on the "Create New Position Distributions" button

Step 5 Click the button to the right of this card to create your new positions in the system. After you create the positions, the data in the grid above will automatically clear.	Create New Position Distributions

osition Attribute Input									Position Base Salar	y by REG/ADM OV	/erride	
	Include?	Contract Type	Contract Type Override	Contract Type Final	Default Start	Vacancy Start Date	Distribution Override Effective Date	Contrac Period	Base Salary	Override Salary?	Salary Override Amount	Final Salary
Research & Environ Cpl Officer (10001161) in Dept. 04150		Fiscal Con		Fiscal Con	Jul 23				\$0		\$0	\$0
Chemical Hygiene Officer (10003229) in Dept. 04150		Fiscal Con		Fiscal Con	Jul 23				\$0		\$ 0	\$0
04150-ENVIRONMENTAL HEALTH & SAFETY									\$0			\$ 0
Exec Director, Campus Safety (10005413) in Dept. 04201	~	Fiscal Con		Fiscal Con	Jul 23	1/1/24 🔳			\$ 187,367		\$0	\$ 187,367
COVID-19 Site Coordinator (10008516) in Dept. 04201		Fiscal Con		Fiscal Con	Jul 23				\$0		\$0	\$0
04201-OFC OF CAMPUS & PUBLIC SAFETY									\$ 187,367			\$ 187,367

To summarize

- Step1 User enters the data for a new position
- Step2 creates the new position by clicking the blue button
- Step3 User fills in salary and start date
- Step4 User provides salary distribution information
- Step5 creates the salary distribution
- Step6 allows user to view how the position is being allocated

Once created

- Zeroing out the salary or the start date in Step3 removes the budget impact of the new position
- The funding distribution can be edited/deleted by the user in <u>4.3a</u>

4.3a Remove New Positions and Distributions

and Type Fund (Op.NenCO) Salary Plan Position Contract Facility or Start Month Delete	Ð	VERSITY	KE.						Remo	ve Ne	w Po	stions	and I	Distrib	utions	5				
und Type Fund (Op/NenCOp) Salary Plan Position Contract Faculty or Start Month Delete	ep 1:																			
und Type Fund (Op/NenCOp) Salary Plan Polition Contract Facility or Start Month Date	elete nev	v position dis	ributions, cl	heck the 'D	elete' box and	d then run i	the 'Delete	New Positic	ns Distribut	ion' action b	elow.									
und Type Fund (Op/NonOp) Salary Plan Position Contract Faculty or Staff Start Month Dele	Position	Distributions																		
	Code	N1 Parent	D1 Parent	D2 Parent	Shared Department	Budget Purpose	Account	Class Code	Fringe Type	Fringe Rate	Fringe Posting	Fringe Offsetting	Fund Type	Fund (Op/NonOp)	Salary Plan	Position Type	Contract Type	Faculty or Staff	Start Month	Dele
	Code	N1 Parent	D1 Parent	D2 Parent	Department	Code	Code	Class Code	Ennge Type	Fringe Rate	Account	Account	Fund Type	(Op/NonOp)	Salary Plan	Туре	Туре	Staff	Start Month	
	Code	Wirarent	DiParent	D2 Parent	Department	Code	Code	Class Code	ringe type	ringe kate	Account	Account	Punu type	(Op/NonOp)	oalary Plan	Туре	Туре	Staff	otartw	Ionui
									Dele	te New Positi	on Distribut	ion								
	n 2:																			

4.3a is where you can delete any new positions or distributions that have been created.

4.4 CBO Export – Current Position Planning

This dashboard is where the position planning data can be exported & imported via an Excel template. This is useful if you have applicable data in a "shadow system" or other spreadsheet and would find it easier to have the budget office import the data into Anaplan instead of manually entering it.

Note: This section carries over the filter settings from 4.1

A Apps - Budg	et Turn Around (BTA)	 4. Position Planning / 	4.4 CBO Export - C	urrent Position Plan	ning v								Q	4 ? (
< 4.4 CBO Export - C	urrent Position Pla	nning ¢ < ☆											FY24 Budget 🗸	Reset 💽
U NIVER ELA	RSITY OF WARE.					CBO E	xport - C	urrent Po	osition Pla	inning				
Support Email			Instructions											,* E
Click Here														
Budget Office			 Click Export Once input 	action to export g overrides have be	and as a cvs for ent een made, send to	ry (Note: Hiters app the budget office us	ing the email link	Position Planning on the page for up	will change the exp pload	ort grids shown he	ne)			Â
Budget Office						-	-							
			Employee Lev	el Inputs:										
			Enter in: Er Enter in da Salary Overrid	nd Date, Rank/Re tes as MM/DD/YY le for Base:	ntention Effective E 'YY to see the over	Dates, Distribution C rides effective as of	verride Effective E the entered date	Dates, FTE Overric	le Dates, Override F	TE? (FALSE to TRU	JE if changing) and i	New FTE		·
Employee Level Inputs														
	Position ID	Position Type	Salary	End Date	Rank/Retention/Speci Faculty/Promotion Effective Date	Distribution Override Effective Date	FTE Override Effective Date	Base FTE	Override FTE?	New FTE	Final FTE	Number of REG	Number of ADMIN	Number of 1/9th
Assanis, Dionissios	10001264	President	\$ 980,000						1		0 1	1	0	
Garcia,Nanda	10005327	Wright House	\$ 45,320								0 1	1	0	
Horan,Sinead	10005281	Chief of Staff	\$ 185,000								1	1	0	
Villo, Laurini	10009201	Giller Group	3 10,000			Labor Inputs	Override Export				v 1			

1. Click the applicable "Export" button to export the selected data as a CSV template for additional data entry or updates.

2. Once changes have been made in the CSV template, send it your budget office contact (or use the email link on the page). The Budget Office will import your file into Anaplan and will inform you when the data is ready to view in Anaplan.

Employee Level Inputs:

• Enter in: End Date, Rank/Rentention Effective Dates, Distribution Override Effective Dates, FTE Override Dates, Override FTE? (FALSE to TRUE if changing) and New FTE

• Enter in dates as MM/DD/YYYY to see the overrides effective as of the entered date

Salary Override for Base:

- Change "Salary Override?" from FALSE to TRUE and enter "New Salary"
- Change "Merit Increase Override?" from FALSE to TRUE and enter "New Merit Increase"
- Enter \$ increase in Rank/Retention OR % increase in Rank/Retention

Salary Override for Admin:

• If the Employee has Admin Distributions then when exporting change "Salary Override?" from FALSE to TRUE and enter "New Salary"

Salary Override for 1/9th:

• If the Employee has 1/9th Distributions then when exporting change "Salary Override?" from FALSE to TRUE and enter "Override Amount"

Labor Distribution Overrides:

• If applicable, change "Override Distribution?" from FALSE to TRUE and then enter "Distribution Override" as % (Note: Distributions must add to 100%)

4.5 CBO Vacancy Planning Export

4.5 can be used in the rare case when vacancy data needs to be exported to Excel to be worked on and then imported back into Anaplan. Your budget analyst can help you with the import function.

< 4.5 CBO Vacancy Planning Export 🗘 < 🛧

FY25 Budget 🗸 Reset 💽

U ELAVVAL	COF RE.			CI	BO Va	acancy	/ Planni	ng Exp	ort			
Support Email Click Here Budget Office												2
 This dashboard lets users a override salaries and distri 1. Check "Include?" to Vacancy The checkbox and "Vacance The user may enter in a context of the salaries of the s	adjust their va butions for ea r Planning deta cy Start Date" ntract period t	cant positions ch position. ails will be yellow to see a 1/9th	s details to p if no date is calculation.	roduce a b	udget in the	e upcoming fi	iscal year. Users	s can adjust sta	art dates, cho	oose to excl	رچا ude, and	¥ ^
College / Unit		Sub-Unit			Dep	artment		O	pen Positions			
STUDENT LIFE	x ~	STUDENT W	ELLBEING	×	~ 0	8101-STUDENT	HEALTH SERVICES	× ~	Find		~	·
Position Attribute Input												
	Include?	Class	Contract Type	Contract Type Override	Contract Type Final	Default Start	Vacancy Start Date	Distribution Override Effective Date	Contract Period	REG Vacancies	ADM Vacancies	Va
Primary Care Provider, SH	~	024	F		F	Jul 24	7/1/24			1	0	
08101-STUDENT HEALTH SE												

4.6 Review All Shared Position

4.6 is a report that can be used to view all your shared positions.

< 4.6 Review	All Shared Position	¢ < ☆										
	D EL	ERSITY OF AVVARE							All Shared	Positions		
Department			Fu	ind Type Category				Purpose				Salary Plan
02101-AGRICU	LTURE AND NATURAL RESOL	JR	× ~	Find			~	Find			~	Find
Position												
Find			~									
Shared Positio	ons											
Salary Plan	Positions	Employee ID	Employee Name	Primary Department	Pay Department	Fund Type		Fund	Salary Account	Fringe Benefit Account	Class	Purpose
211-Faculty, F	10003889-S. Hallock du	700891074	Messer,Kent	02130-APPL ECONOMIC	02101-AGRICULTURE AN	46 - Endowment	OP		121110 - FACULTY ADMN	129100 - FB CHARGES	903	AGRI467777-02101-021
211-Faculty, F	10002496-Genaurdi Ter	702726008	Segovia Coronel, Michelle S	5 02130-APPL ECONOMIC	02101-AGRICULTURE AN	11 - Basic Budget	OP		121120 - FACULTY NINT	129100 - FB CHARGES	104	AGRI110000-02101-AG &
211-Faculty, F	10001290-Assistant	702723934	Zhao,Peng	02130-APPL ECONOMIC	02101-AGRICULTURE AN	11 - Basic Budget	OP		121120 - FACULTY NINT	129100 - FB CHARGES	152	AGRI110000-02101-AG &
211-Faculty, F	10001796-Assistant	702770634	Bekele-Yitbarek,Alexander	02150-ANIMAL AND FOO	02101-AGRICULTURE AN	11 - Basic Budget	OP		121120 - FACULTY NINT	129100 - FB CHARGES	152	AGRI110000-02101-AG &
211-Faculty, F	10003960-Professor	700829253	Gressley,Tanya	02150-ANIMAL AND FOO	02101-AGRICULTURE AN	11 - Basic Budget	OP		121120 - FACULTY NINT	129100 - FB CHARGES	117	AGRI110000-02101-AG &
211-Faculty, F.,.	10003960-Professor	700829253	Gressley,Tanya	02150-ANIMAL AND FOO	02101-AGRICULTURE AN	11 - Basic Budget	OP		121100 - FACULTY FULL	129100 - FB CHARGES	117	AGRI112112-02101-ACA
202-Profession.	10000307-Sr Scientist	13395	Ladman,Brian	02150-ANIMAL AND FOO	02101-AGRICULTURE AN	11 - Basic Budget	OP		120210 - PROF F/T ADM	129100 - FB CHARGES	005	AGRI110000-02101-AG &
211-Faculty, F.,	10001274-Assistant	702726109	Tan, Juzhong	02150-ANIMAL AND FOO	02101-AGRICULTURE AN	11 - Basic Budget	OP		121120 - FACULTY NINT	129100 - FB CHARGES	106	AGRI110000-02101-AG &
211-Faculty, F	10000518-Assistant	702727139	Peterson, Jennifer	02160-ENTOMOLOGY &	02101-AGRICULTURE AN	11 - Basic Budget	OP		121120 - FACULTY NINT	129100 - FB CHARGES	136	AGRI110000-02101-AG &
202-Profession.	. 10001496-Research	25199	Gartley,Karen	02170-PLANT & SOIL SCI	02101-AGRICULTURE AN	22 - State Restricted	OP		120200 - PROFESSIONAL	129100 - FB CHARGES	002	AGRI222111-02101-SOIL
211-Faculty, F	10001480-Assistant	702725955	Huddell,Alexandra	02170-PLANT & SOIL SCI	02101-AGRICULTURE AN	11 - Basic Budget	OP		121120 - FACULTY NINT	129100 - FB CHARGES	138	AGRI110000-02101-AG &

5. Other Labor

The Other labor section is where Other labor like overtime and misc wage is input.

<	5.1 Other Labor Calculation Engine 🗘 🖈	FY24 Budget 🗸	Final Amo	unt 🗸	Reset	··· 🔊	Additional i	nsights	
Q	Find		ি 🖬 🕅	7 î↓	•	₩ ≣ …	Time Fi	ilter	
			FY22		FY23	FY24		Years	Source
	PRES110000 & 120400 - SUPPLEMENTAL PAY - PROFESSIONA & OP		11,2	35	12,000	12,000	FY17		ACTUALS
	PRES112118 & 125200 - MISC WAGE-INCL PRT-TIME NON UD & OP		507	7.6	0	0	FY18		ACTUALS
							FY19		ACTUALS
							FY20		ACTUALS
							FY21		ACTUALS
							FY22	✓	ACTUALS
							FY23	~	PREVIOUS BUDGET
							FY24	~	CURRENT BUDGET
							Sub-Catego	ry (Other Labor)	· · ·
							Find	ry (Other Labor)	~
							GL Account	(Other Labor)	
							Find		~
							College / Ur	nit	
							Find		~
							Department		
							00101-OF	OF THE PRESIDEN	× ×
							Budget Purr	oose	

5.1 Other Labor Calculation Engine

5.1 is a page to view the data, there are no actions to be done here. 5.1 gives you a view of all the historic other labor activity for the selected College/Unit or Department. It might be useful to have this tab open, and then work on inputting other labor on a separate tab (i.e. 5.4).

5.2 Other Labor Driver Review and Override

5.2 Other Labor Driver Review and Overric	le Φ < ☆				F	r24 Budget →	Reset
ELAWAR	Æ.	Calculation I	Engine Drivers	Accounts Missin O	ng Driver Methods		
this dashboard you can set the driver methods for epopulated by an account level driver selection in the that you can sync the lower levels of the account	or each different account n made by the budget office ount hierachy by clicking o	which will ultimately drive the develop e. If you want to review the driver meth on a row header. This will filter the grid	nent of your budget. This is done at a ods selected for your unit, you may do s below to only show the children of th	Purpose - Account con o so at the bottom of the ne selected item.	catenation level. These con e grid.	catenations will	l be
nancial Statement Line Item (Other Labor)		Sub-Category (Other Labor)		GL Account (Other I	Labor)		
nancial Statement Line Item (Other Labor) Find	~	Sub-Category (Other Labor)	~	GL Account (Other I	Labor)		
nancial Statement Line Rem (Other Labor) Find	Department	Sub-Category (Other Labor)	Budget Purpose	GL Account (Other I	Labor) Departments Submitte	d for Approval	
ancial Statement Line Item (Other Labor) Find Illege Unit Find	Department Find	Sub-Category (Other Labor)	Sudget Purpose	GL Account (Other I	Labor) Departments Submitte	d for Approval	
ancial Statement Line Rem (Other Labor) Find Ilege Unit Find ver Method	Pepartment Find Fund Type Categor	Sub-Category (Other Labor) Find.	Budget Purpose Find Purpose - Account	GL Account (Other I	Labor) Departments Submittee	d for Approval	mitted?
inclal Statement Line Item (Other Labor) incl loge Unit incl er Method incl		Sub-Category (Other Labor) Find	Budget Purpose Find Purpose - Account Find	GL Account (Other I	Departments Submittee	d for Approval Sub	mitted?
ancial Statement Line Item (Other Labor) Find Isege Unit Find ver Method	Department Find Fund Type Categor Find	Sub-Category (Other Labos) Find Y	Budget Purpose Find. Purpose - Account Find.	GL Account (Other I	Labor) Departments Submittee 02101-AGRICULTURE A 02105-AGRICULTURE A	d for Approval Subi	mitted?
ancial Statement Line Item (Other Labor) Frod Rege Unit Frod New Method Frod	Department Find Fund. Type Categor Find	Sub-Craegory (Other Labor) Find. V Y	Sudget Purpose Find. Purpose - Account Find.	GL Account (Other I	Departments Submittee	d for Approval Subr	mitted?

5.2 lists the driver methods that the budget office initially set up for the Other Labor purpose & account combinations. The user can override these selections if applicable.

In this section you can set the other labor line-item drivers at various levels (Line Item, Sub-Category, or GL Level)

φ input	
\$ Input	
% Growth	
\$ Input	
Trend	
No Change	
Multiple Line Input	
No Value	

% **Growth** – uses a simple percent growth rate

\$ Input – defaults to baseline set by the Budget Office (PY budget or actuals), but allows the user to override.

Trend – takes a 3 year average

No change – take baseline budget, but users can't override the amounts.

Multiple Line Input – allows for multiple driver manipulations

No Value – makes it equal to zero

5.3 Manual Growth Rate Summary

< 5.3 Manual Growth Rate Summary 💠 < 🕁		FY24 Budget 🗸 Reset 🕞 …
ELAWARE.	Growth Rate Summary	702 Calculation Engine Drivers >
In this deshboard you can set the growth rates for each account which will u automatically populate all children with that rate, you can then override at a If the % Growth Override' column in the grid below is highlighted orange, th highlighted yelow, that means that a child of that account has been override Note that you can sync the lower levels of the account hierachy by clicking of The % Final Growth' column in the bottom grid is what the model with ultime	ittimately drive the development of your budget for those accounts for which yo child level for any exceptions. This allows you to make as little inputs as possibl is means you have entered a % but not checked the override column next to it r den. In this case there is no issue, it is just an indicator. on a row header. This will filter the grids below to only show the children of the stately use to calculate the budget you are developing for the upcoming fiscal year.	u selected the % Growth' driver. Setting a growth rate at a parent level will e, and not have to make the inputs GL account by GL account. meaning that value will not be applied. If the % Final Growth' column is selected item.
Growth Drivers by A2 Accounts		
	% Growth	
SALARIES AND WAGES		0%
EMPLOYEE BENEFIT EXP		0%

If you put a manual growth rate on any of your Other Labor, you should be able to see those listed here.

5.4 Other Labor Manual Inputs

This is where you can manually input the other labor. The initial baseline is set by the Budget Office. If you wish to update that amount, you need to click on the checkbox in the "Override?" column, then type in the amount in the "Manual \$ Input" column. Both items need to be done to complete the update. The number in the "\$ Input Final" is what will appear in the proposed budget.

	• 4				
ELAWARE.			Other Labor Inp	outs	
In this dashboard you can input you non-l	labor adjustme	ents at a pooled purpose - account level.			
You can use the filters to only show releval	int Purpose - A	ccount items below.			
Fill in other details as requirements are ha	shed out and	dashboard is finalized]			
Financial Statement Line Item (Other Labor)		Sub-Category (Other Labor)	GL Account (Other Labor)	Departments Submitted for A	pproval
inancial Statement Line Item (Other Labor) Find	~	Sub-Category (Other Labor)	GL Account (Other Labor)	Departments Submitted for A	pproval
nancial Statement Line Rem (Other Labor) Find ollege / Unit	~	Sub-Category (Other Labor) Find_ ~ Department	GL Account (Other Labor) Find	Departments Submitted for A	pproval Submitted?
nancial Statement Line Item (Other Labor) Find	×	Sub-Category (Other Labor) Find. Department End	GL Account (Other Labor) Find Budget Purpose	Oepartments Submitted for A O2101-AGRICULTURE AN	pproval Submitted?
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AGCM110000 & 125200 - MISC WAGE-INCL PRT-TIME NON UD & OP	20,000		0	20,000
AGCM110000 & 126000 - STUDENT LABOR & OP	10,000		0	10,000
AGCM110000 & 126900 - GRAD STDT-ENROLLED < 1/2 TIME & OP	0		0	0
AGCM112113 & 125200 - MISC WAGE-INCL PRT-TIME NON UD & OP	20,000		0	20,000
AGCM112113 & 126000 - STUDENT LABOR & OP	20,000		0	20,000
AGCM112113 & 126900 - GRAD STDT-ENROLLED < 1/2 TIME & OP	0		0	0
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5.5 Other Labor by Line Input

<	5.5 Other Labor by Line Input 💠 < 🕁									FY24 Bud	get 🗸 Reset	Ð
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This is where in the case of multiple line item drivers (i.e. if you wanted to do a growth rate plus some fixed amount). **Most departments will probably not use this selection**.

6. Submissions

The submissions area is where the workflow process occurs and is tracked. Once the budgeting and labor areas are completed, they need to be submitted for approval.

Apps 🗸 Budget Turn Around (BTA) 🗸	6. Submissions / 6.1 Budgeting Sub	bmissic	ons	
6.1 Budgeting Submissions $\diamondsuit < \bigstar$	Recents	>		
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Click Here	3. Budgeting	>		
	4. Position Planning	>		
	5. Other Labor	>		
	6. Submissions	>	6.1 Budgeting Submissions	
nstructions	7. Budget Office Inputs	>	6.2 Budgeting CBO Approvals	
 If department is orange then labor is submitte 	8. Reporting	>	6.3 Dean / VP Approvals	
	Landing Pages	>	6.4 Final Approvals for Budgeting	
Rudget Approvals	Uncategorized	>	6.5 Submission Progress	

6.1 Budgeting Submissions

Users that have been assigned the "CBO Reviewer + Prepare" role should have the ability to make additions/changes to any DeptID within their assignment as long as that DeptID has not been submitted into the workflow process. If the DeptID has been submitted, and the next approval level (CBO, Unit lead, or Dean/VP) rejects it, the original preparer has to resubmit it. The next approval level (CBO, Unit lead, or Dean/VP) cannot resubmit it. If a DeptID is in some workflow status and the original preparer is unavailable, the Budget Office has the ability to temporarily unlock a DeptID and either make the necessary changes or unlock and have the College/Unit make the necessary changes. Then the Budget Office would have to "relock" (remove the unlock) from that DeptID.

Once the budgeting work is complete, the user can navigate to 6.1 and click on the applicable DeptID under the "Submit?" column and then click the "Submit Budgeting" button. This "sends" the budgeting work for that DeptID to the next approval level (CBO, Unit lead or Dean/VP)

< 6.1 Budgeting Submissions 🗘 🔩 🛧

FY24 Budget 🗸 🛛 R

ELAWARE,		Budge	t Submissions	
Support Email Click Here				
Instructions If department is orange then labor is submit 	ted and not budget, if it is blue then budget is subn	nitted and not labor.	Submit Budgeting	
Budget Approvals				
College/Unit	Department Code	Department Name	Submit?	Budgeting Submitted?
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ACRICULTURE & NATURAL RESOURCE	00100			
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Tip: if you have numerous DeptID's that you want to process together, you can click the checkbox on the top one and then right click to bring up the "Copy Down" menu selection. Click that on that and your checkmark will be copied down to the last item.

6.2 Budgeting CBO Approvals

Once the DeptID budget is submitted via <u>6.1</u>, the same or another user can navigate to 6.2 and click on the applicable DeptID under the "Submit?" column and then click the "Submit Labor Budget" button. This "sends" the labor work for that DeptID to the next approval level (CBO, unit lead or Dean/VP)

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Tip: if you have numerous DeptID's that you want to process together, you can click the checkbox on the top one and then right click to bring up the "Copy Down" menu selection. Click that on that and your checkmark will be copied down to the last item.

6.3 Dean / VP CBO Approvals

This area tells you whether the work has been submitted, approved, rejected or ultimately approved **at the CBO or Unit Lead level.** If an approver wants to approve a particular DeptID, they can click on "CBO Approve?" and then click on "Approve Budgeting". If an approver wants to reject a particular DeptID, they would click on "CBO Reject?" and then click on "Reject Budgeting".

If you would just like to see what is rejected, click on the "Rejected Budget Approvals?" checkbox at the upper right.

6.3 Dean / VP Approvals 💠	< ☆			FY25 Budget V Reset
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College/Unit	Department Code	Department Name	Dean / VP Approve?	Dean / VP Reject?
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College/Unit AGRICULTURE & NATURAL RESOURCE AGRICULTURE & NATURAL RESOURCE AGRICULTURE & NATURAL RESOURCE AGRICULTURE & NATURAL RESOURCE AGRICULTURE & NATURAL RESOURCE	Department Code 02101 02130 02140 02150 02160 02170 02210	Department Name AGRICULTURE AND NATURAL RESOUR APPL ECONOMICS & STATISTICS (WBIORESOURCES ENGINEERING ANIMAL AND FOOD SCIENCES ENTOMOLOGY & WILDLIFE ECOLOGY PLANT & SOIL SCIENCE COOPERATIVE EXTENSION SERVICE	Dean / VP Approve?	Dean / VP Reject?
College/Unit AGRICULTURE & NATURAL RESOURCE AGRICULTURE & NATURAL RESOURCE	Department Code 02101 02130 02140 02150 02160 02170 02210 02310	Department Name AGRICULTURE AND NATURAL RESOUR APPL ECONOMICS & STATISTICS (WBIORESOURCES ENGINEERING ANIMAL AND FOOD SCIENCES ENTOMOLOGY & WILDLIFE ECOLOGY PLANT & SOL SCIENCE COOPERATIVE EXTENSION SERVICE AGRICULTURE-NEWARK FARM	Dean / VP Approve?	Dean / VP Reject?
College/Unit AGRICULTURE & NATURAL RESOURCE AGRICULTURE & NATURAL RESOURCE	Department Code 02101 02130 02140 02150 02160 02170 02210 02310 02320	Department Name AGRICULTURE AND NATURAL RESOUR APPL ECONOMICS & STATISTICS (WBIORESOURCES ENGINEERING ANIMAL AND FOOD SCIENCES ENTOMOLOGY & WILDLIFE ECOLOGY PLANT & SOIL SCIENCE COOPERATIVE EXTENSION SERVICE AGRICULTURE-NEWARK FARM AGRICULTURE RESEARCH/EDUCATION	Dean / VP Approve?	Dean / VP Reject?
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College/Unit AGRICULTURE & NATURAL RESOURCE AGRICULTURE & NATURAL RESOURCE	Department Code 02101 02130 02140 02150 02160 02170 02310 02320 01470 01470 02501	Department Name AGRICULTURE AND NATURAL RESOUR APPL ECONOMICS & STATISTICS (M)BIORESOURCES ENGINEERING ANIMAL AND FOOD SCIENCES ENTOMOLOGY & WILDLIFE ECOLOGY PLANT & SOIL SCIENCE COOPERATIVE EXTENSION SERVICE AGRICULTURE-NEWARK FARM AGRICULTURE RESEARCH/EDUCATION ENGLISH LANGUAGE INSTITUTE ARTS & SCIENCES	Dean / VP Approve?	Dean / VP Reject?

Tip: if you have numerous DeptID's that you want to process together, you can click the checkbox on the top one and then right click to bring up the "Copy Down" menu selection. Click that on that and your checkmark will be copied down to the last item.

6.4 Final Approvals for Budgeting

6.4 is where the Dean or VP (or their designate) would go to approve the budget and route it to the Budget Office.

This area tells you whether the budget has been submitted, approved, rejected or ultimately approved. If an approver wants to approve a particular DeptID, they can click on "Dean/VP Approve Budgeting?" and then click on "Approve Budgeting". If an approver wants to reject a particular DeptID, they would click on "Reject?" and then click on "Reject Budgeting".

If you would just like to see what is rejected, click on the "Rejected Budget Approvals?" checkbox at the upper right.

<	6.4 Final Approvals	for Budgeting 🗘 <	☆			FY25 B	udget 🗸 Reset 🗜
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	College/Unit	Department Code	Department Name	Dean / VP Approve Budgeting?	Finalize?	Reject?	Budget Finalized?
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	AGRICULTURE & NATURA	02150	ANIMAL AND FOOD				
	AGRICULTURE & NATURA	02160	ENTOMOLOGY & WILDLIF				
	AGRICULTURE & NATURA	02170	PLANT & SOIL SCIENCE				
	AGRICULTURE & NATURA	02210	COOPERATIVE EXTENSIO				
	AGRICULTURE & NATURA	02310	AGRICULTURE-NEWARK				
	AGRICULTURE & NATURA	02320	AGRICULTURE				
		04470	ENCLICULANCUACE				

Tip: if you have numerous DeptID's that you want to process together, you can click the checkbox on the top one and then right click to bring up the "Copy Down" menu selection. Click that on that and your checkmark will be copied down to the last item.

6.5 Submission Progress

This report tracks the overall workflow progress of each DeptID. The goal is to get all plan files approved and submitted to the Budget Office. This is an informational dashboard and not where the DeptID's are approved or rejected.

< 6.5 Submission Progress 🗘 < 🛠				FY	25 Budget 🗸	Reset 🕞	
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	College / Unit		Department				
Support Email Click Here	COMMUNICATIONS & MARKETING	x ~	Find			~	,
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8. Reporting

8.1 Labor Distribution

8.1 shows the position detail for all positions that are currently listed under the primary (or home) selection for the College/Unit or Department (selected via the User Filter). Data can only be viewed here, not changed.

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Position Description	Position ID	Employee ID	Employee Name	Primary Department	Pay Department	Salary Account	Fringe Benefit Account	Class	s Contract Type
Dean	10000328	50586	Pelesko, John	02501-ARTS & SCIENCES	02501-ARTS & SCIENCES	120200 - PROFESSIONAL ST	129100 - FB C	001	Fiscal
Manager, ELI	10005880	41489	Hyde,Kenneth	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	013	Fiscal
Systems	10006938	700523186	Walton,Susan	01470-ENGLISH LANGUAGE INSTITUTE	02608-CAS ACADEMIC ADMINISTRATION	120200 - PROFESSIONAL ST	129100 - FB C	052	Fiscal
Systems	10006938	700523186	Walton,Susan	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	052	Fiscal
Business	10000682	18293	Arban,Robert	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	009	Fiscal
Business	10000682	18293	Arban,Robert	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	009	Fiscal
Academic	10006866	701391825	Goode,Terri	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	046	Fiscal
Academic	10006861	702029838	Fenske,Ross	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	051	Fiscal
Academic	10006855	700588106	Farling,Monica	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	032	Fiscal
Academic	10006869	702268552	Pennington,Wakako	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	043	Fiscal
Academic	10006829	700993505	Kim,Eui Jung	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	018	Fiscal
Academic	10006974	701280812	Woods, Christienne	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	052	Fiscal
Academic	10006889	700585934	Ramadan,Ruwida	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	036	Fiscal
Academic	10006843	700580022	Vazquez,Amy	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	023	Fiscal
Academic	10006879	702018678	Connery,Leslie	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	039	Fiscal
Academic	10006867	701518658	Panter,Thomas	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	045	Fiscal
Academic	10006830	700061755	Jackson,Brandon	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	019	Fiscal
Academic	10006868	701724387	Wherry,William	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	044	Fiscal
Academic	10006880	700532719	Milbury-Steen,Blythe	01470-ENGLISH LANGUAGE INSTITUTE	02550-LANGUAGES LITERATURES CULTURES	120200 - PROFESSIONAL ST	129100 - FB C	501	Fiscal
Asst Director	10003237	702716163	Miller,Avery	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	006	Fiscal
Asst Director	10005124	34468	Schumacher,Baerbel	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	501	Fiscal
Asst Director	10006464	29446	Brown,Kirsten	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	054	Fiscal
ELI Student	10005914	700867981	Boyle,Rebecca	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	055	Fiscal
Mgr, ELI	10006458	702314439	Riera, Maria Jose	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	053	Fiscal
Assoc	10005823	700452761	Asenavage,Karen	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	012	Fiscal
Asst Dir, ELI	10006860	702019686	Bushong,Robert	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	022	Fiscal
Project	10007661	701558954	Forrest.Jamie	01470-ENGLISH LANGUAGE INSTITUTE	01470-ENGLISH LANGUAGE INSTITUTE	120200 - PROFESSIONAL ST	129100 - FB C	056	Fiscal

On the right side of the screen there are various filter selections, including College/Unit.

User Filter	
College / Unit	
STUDENT LIFE	x ~
Fund Type Category	
Find	~
Purpose	
Find	~

Once you select a College/Unit, you also can select individual Departments to view within that College/Unit by using the checkboxes under "Department to View".

	Department to View
05308-RES LIFE & HOUS	
05310-HOUSING & CONF	
05311-HOUSING & CONF	
05404-STUDENT HOUSI	
06001-STUDENT LIFE	
06004-STUDENT LIFE C	
06005-ASSISTANT VP S	
06010-GREEK LEADERS	

Clear Department to View

Tip: If you have previously selected a department or group of departments, and you wish to quickly clear out those prior selections, you can click on the "Clear Department to View" button to deselect all the selected departments.

~	Instructions
•	If you are in the Budget Office you must select "Show All Units", or a College/Unit, or Department to View to see any filter selection results
•	If you are not in the Budget Office then you must select a Department to View to see additional filter results
•	Run action to Clear Department to view

Note: The summation of the 8.1 position data will not necessarily equal the salary charge to the specified College/Unit or Department due to positions that are Department Owned / Paid Elsewhere (charges flowing out to another College/Unit or Department) or are Shared (charges coming in from another College/Unit or Department). A "truer" salary impact can be found on the report 8.6 or 8.6b.

8.2 Labor Roster

The Labor Roster page shows all the positions within the primary College/Unit or Department selected in the filters. This page shows position data (similar to 8.1), but with a few other fields. Data can only be viewed here, not changed.

< 8.2 Labor Roster 🗘 < 🕁

<u>o</u> ,										
Salary Plan	Position Type	Position ID	Employee ID	Employee Name	Contract Type	Start Date	End Date	FTE	Working Hours	Pay Type
202-Professional, Full Time	Administrative Specialist	10009193	702387868	Colella,Alexandra	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Division HR Director	10008912	702671490	Corry,Anna	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Business Administrator I	10002311	701718124	Gibson,Kathryn	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Business Officer	10001063	700465584	Gleason,Laura	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Sr Business Administrator	10002694	20758	Hill,Lori	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Sr Advisor	10008919	701221062	Kovanic,Heather	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	AVP, Student Exp & Belonging	10000090	702372230	Long,Nicole	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Sr Business Administrator	10002503	702411894	Rhodunda,Debbie	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Sr Business Administrator	10002503	702411894	Rhodunda,Debbie	Fiscal	Jul 22	Jun 23	1	37.5	Salary
200-Senior Administrators	Vice Pres, Student Life	10003622	701515116	Riera, Jose-Luis	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Project Specialist	10009213	702496872	Rogalski,Melanie	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	HR Generalist	10009075	701510789	Sorantino,Lisa	Academic	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	HR Generalist	10009075	701510789	Sorantino,Lisa	Academic	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Asst to the Vice President	10005259	700582422	Ulizio, Jennifer	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Digital Content Specialist	10009143	700586828	Ashley,Sarah	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Director, Communications	10008640	48943	Catalino Tansley,Heather	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Director, Communications	10008640	48943	Catalino Tansley,Heather	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Communications Manager	10001450	51987	Cummings,Sarah	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Digital Comm Specialist	10008207	59314	Diffendall,Sean	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Communications Specialist II	10001783	701653937	Downey, Jessica	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Project Coord, Communications	10000431	701133513	Hazzard,Breashia	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Communications Specialist I	10009144	701376773	Homola,Randi	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Communications Manager	10002004	700975142	Phillips, Abigail	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Communications Specialist I	10009218	701060330	Smith,Kirk	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Program Coord, FSLL	10005221	701369717	Henry,Roderick	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Program Coord, FSLL	10005221	701369717	Henry,Roderick	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Assoc Director, FSLL	10002888	702488621	Lowery,Sara	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Assoc Director, FSLL	10002888	702488621	Lowery,Sara	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Program Coord, FSLL	10006825	702670234	Vogelsong,Hannah	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Program Coord, FSLL	10006825	702670234	Vogelsong,Hannah	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Assoc Dir & Sr Asst Dean	10006049	702531808	Armstrong,Brian	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Dean of Students	10003320	701575752	Cantley,Adam	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Dean of Students	10003320	701575752	Cantley,Adam	Fiscal	Jul 22	Jun 23	1	37.5	Salary
202-Professional, Full Time	Dean of Students	10003320	701575752	Cantley,Adam	Fiscal	Jul 22	Jun 23	1	37.5	Salary

On the right side of the screen there are various filter selections, including College/Unit.

x ~
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Once you select a College/Unit, you also can select individual Departments to view within that College/Unit by using the checkboxes under "Department to View".

	Department to View
05308-RES LIFE & HOUS	
05310-HOUSING & CONF	
05311-HOUSING & CONF	
05404-STUDENT HOUSI	
06001-STUDENT LIFE	
06004-STUDENT LIFE C	
06005-ASSISTANT VP S	
06010-GREEK LEADERS	

Tip: If you have previously selected a department or group of departments, and you wish to quickly clear out those prior selections, you can click on the "Clear Department to View" button to deselect all the selected departments.

^a Instructions

• If you are in the Budget Office you must select "Show All Units", or a College/Unit, or Department to View to see any filter selection results

Clear Department to View

- If you are not in the Budget Office then you must select a Department to View to see additional filter results
- Run action to Clear Department to view

Note: The summation of the 8.2 position data will not necessarily equal the salary charge to the specified College/Unit or Department due to positions that are Department Owned / Paid Elsewhere (charges flowing out to another College/Unit or Department) or are Shared (charges coming in from another College/Unit or Department). A "truer" salary impact can be found on the report 8.6 or 8.6b

8.3 Statement of Activities (by Fund Type)

This report presents the standard AFR reporting view for a particular time period with Fund Types across the top and financial line items going down the page. The College/Unit/Sub-Unit is selected under "Unit to View" filter at the right. You may also select one or more individual departments under "Department to View". The year selection toggle (shows "FY25" below) can be used to select the budget year that is being worked on, the previous year's budget, or previous years of actual data. At the top of the report, there is a line Source that will say BUDGET, CURRENT BUDGET, or ACTUAL, depending on what fiscal year you selected in the year selection toggle.

A Apps - Budg	et Turn Around (BTA	i) 👻 8. Reporti	ng / 8.3 Statement of	Activities (by Fund	Type) 🗸								Q	<u>)</u> ? (
< 8.3 Statement of A	ctivities (by Fund	d Type) 🗘 < 🕁								FY25 Budget	• FY25 •	Reset D	Additional insights	
Q Find										9	₽ ↑ €	> ≞ ⊑ …	Show All Units	
	Basic Budget	Self Supporting	Reserves	Startups	Service Centers	Gifts	Endowment	State Restricted	Sponsored Activity	Central Bank	Major Capital	All Fund Types		
Expense													H 11-3-1-37	
Professional Salaries	\$0	\$ 2,666,089	\$0	\$0	\$ 0	\$ 0	\$ 0	\$0	\$0	\$ 0	\$ 0	\$ 2,666,089	Contro view	
Faculty Salaries	\$0	\$0	\$0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$0		
S-Contracts	\$ 0	\$ 12,000	\$ 0	\$0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 12,000		-
Graduate Student Salaries	\$ 0	\$ 117,500	\$ 0	\$0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 117,500	College / Unit	STUDENT LIFE
Salaried Staff, Hourly, & OT	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$0	\$ 0	\$ 0	\$0	Sub-Unit	RES LIFE & FN
Wages	\$ 0	\$ 3,101,302	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 3,101,302		
Fringe Benefits - Exempt	\$ 0	\$ 267	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 267	Instructions	
Fringe Benefits - Non Exempt	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$0		
Fringe Benefits - Other	\$ 0	\$ 194	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ (\$ 194	Run action to Clear De	epartment 🔺
Fringe Benefits - Grad Stude	\$ 0	\$12	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 12	to view	-
Benefits	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$0		
Benefits Credits	\$ 0	\$0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$0		
Total Compensation	\$ 0	\$ 5,897,364	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 5,897,364	Class Desertment	
													Clear Department	to view
Travel	\$ 0	\$ 51,872	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 51,872		
Supplies and Expense	\$0	\$ 541,233	\$ 38,063	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 579,296		
Plant M & O	\$ 0	\$ 56,625	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 56,625		
Sub-Contracts	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$0	Department to View	
Library Books & Cap Equip	\$ 0	\$0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$0	\$0	\$ 0	\$ 0	\$0		\frown
Information Processing	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$0		Department to View
Interdepartmental Credits	\$0	\$ 150	\$0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 150		to view
Debt Service	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$0	05308-(D) RES LIFE & HO.	
fotal Expenditures	\$ 0	\$ 6,547,244	\$ 38,063	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 6,585,307	05310-HOUSING & CONF.	
													OF THE MOUSE INC. & COME	

If you are comfortable with this format, it might be helpful to keep this report open on a separate tab as you formulate the budget. As you make changes, you can then refresh this report to see your budget in the AFR format.

8.4 Statement of Activities Trend

This page is similar to 8.3 but is for one fund type category over time. Select a single fund type category (at the top). The years presented (from right-to-left) are the Budget (budget currently being worked on), the Current Budget (the last finalized budget), and the rest of the columns are actuals.

College/Unit and Sub-Unit can be selected with the filters to the right. You may select one or more individual departments to view under "Department to View".

🔥 Apps 🗸 🖌 Bud	get Turn Around (BTA) 🗸	8. Reporting / 8.4 State	ment of Activities Trend 🐱							Q 4	
< 8.4 Statement of A	activities Trend 💠 <	¢					FY25 But	iget v Self Supporting	v Reset 🗵	Additional insights	
Q Find								9 6 7	₺ @ Щ ₺ ₿ …	Show All Units	
	FY17	FY18	FY19	FY20	FY21	FY22	FY23	FY24	FY25		
ource	ACTUALS	ACTUALS	ACTUALS	ACTUALS	ACTUALS	ACTUALS	ACTUALS	CURRENT BUDGET	BUDGET		
ginning Balance	\$0	\$ 0	\$0	\$0	\$ 0	\$ 0	\$0	\$ 0	\$0		
ERATING										College / Unit	STUDENT L
vonuo										Sub-Unit	RES LIFE 8
Indergraduate Tuition & Fees	\$0	\$ 0	\$ 0	\$0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0		
raduate Tuition & Fees	\$0	\$0	\$ 0	\$0	\$0	\$ 0	\$0	\$0	\$ 0		
ther Tuition & Fees	\$0	\$0	\$ 0	\$0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	La Instructions	
al Tuition & Fees	\$0	\$ 0	\$0	\$0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	Run action to Clear De	partment
tudent Aid	\$0	\$0	\$0	\$0	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	to view	
raduate Tuition Expense	(\$ 35,316)	(\$ 67,532)	(\$ 81,401)	(\$ 129,823)	(\$ 68,328)	(\$ 153,900)	(\$ 102,795)	(\$ 103,000)	(\$ 103,000)		
al Tuition Discount	(\$ 35,316)	(\$ 67,532)	(\$ 81,401)	(\$ 129,823)	(\$ 68.328)	(\$ 153,900)	(\$ 102,795)	(\$ 103,000)	(\$ 103,000)		
t Tuition	(\$ 35,316)	(\$ 67,532)	(\$ 81,401)	(\$ 129,823)	(\$ 68,328)	(\$ 153,900)	(\$ 102,795)	(\$ 103,000)	(\$ 103,000)	No. 10 August 10 Aug	
entral Allocation										Clear Department t	to View
tate Restricted Appropriation	\$0	\$0	\$0	\$0	\$ 0	\$0	50	\$0	\$0		
ate Unrestricted Appropria.	\$0	50	50	\$0	\$0	\$0	\$0	\$ 0	50		
ederal Appropriation	\$0	50	\$0	50	\$0	\$0	\$0	50	\$0	m	
ontracts & Grants Federal	\$0	\$0	\$0	\$0	\$0	50	50	\$0	50	Department to View	
A Cost Recoveries	\$0	\$0	\$0	\$0	\$0	\$ 0	50	\$ 0	\$0		Departme
fts	\$0	\$0	\$0	\$0	\$0	\$ 0	\$0	\$ 0	\$0		to View
dowment Payout	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	OF 208 (D) RESILIES & HO	
mporary Investment Income	\$0	\$0	\$ 0	50	\$0	\$0	\$0	50	5.0	OF THE HOLES LIFE & HO.	
her Sources Revenue	\$0	\$0	\$0	\$0	\$ 0	\$0	\$0	\$ 0	\$ 0	OF 310 HOUSING & CONF.	
										USATI HOUSING & CONF	L

8.5 BTA Dashboard

The BTA Dashboard is similar to 8.4, but with a slightly different column layout. The report shows YTD Actuals as of when the data was pulled into BTA and the base budget before any adjustments.

/					FY24	Budget ∽ , ≝ ਵ
Q Find						7 ी↓ ⊚ [}
	2 Years Prior	Prior Year	Current Year Net Budget	YTD Actuals	Base Budget	Proposed Budget
OPERATING						
Revenue						
Undergraduate Tuition & Fees	0	0	0	0	0	0
Graduate Tuition & Fees	0	0	0	0	0	0
Other Tuition & Fees	8,522,644	9,270,521	9,239,309	9,312,141	9,239,309	9,239,309
Total Tuition & Fees	8,522,644	9,270,521	9,239,309	9,312,141	9,239,309	9,239,309
Student Aid	(108,355)	(15,155)	(4,000)	(6,410)	(4,000)	(4,000)
Graduate Tuition Expense	(71,328)	(176,810)	(119,700)	(102,795)	(119,700)	(119,700)
Total Tuition Discount	(179,683)	(191,965)	(123,700)	(109,205)	(123,700)	(123,700)
Net Tuition	8,342,962	9,078,556	9,115,609	9,202,936	9,115,609	9,115,609
Central Allocation	0	0	0	0	0	0
State Restricted Appropriation	0	0	0	0	0	0
State Unrestricted Appropriation	0	0	0	0	0	0
Federal Appropriation	0	0	0	0	0	0
Contracts & Grants Federal, State, & Other	0	0	0	18,000	0	0
F&A Cost Recoveries	0	0	0	0	0	0
Gifts	732,903	1,019,642	1,262,223	442,404	1,262,223	1,262,223
Endowment Payout	16,297	23,413	25,304	34,430	25,304	25,304
Temporary Investment Income	12,733	20,909	18,028	27,537	18,028	18,028
Other Sources Revenue	200,427	380,998	404,615	939,156	404,615	404,615
Activities of Educational Departments	(40,863)	60,061	66,599	8,272	66,599	66,599
Auxiliaries	14,125,678	14,325,162	14,588,501	14,599,646	14,588,501	14,588,501
Total Revenue	23,390,137	24,908,741	25,480,879	25,272,381	25,480,879	25,480,879
Expense						
Professional Salaries	11,192,400	11,163,412	15,180,124	11,483,836	15,180,124	15,626,088
Faculty Salaries	0	0	0	0	0	0
S-Contracts	109,132	207,583	556,332	327,122	556,332	556,332

8. Reporting / 8.5 BTA Dashboard 🗸

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8.6 Labor Distribution to Budget Tie-Out

Budget Turn Around (BTA) 🗸

Apps 🗸

< 8.6 Labor Dist	ribution to Budget Tie-Out 🕻	> < ☆										FY24 Budget 🐱	Reset 💽
College / Unit		x ~	Department 01003-COMMUNIT	Y ENGAGEMENT		Fui	nd Type Category		~	Show All Units			
Purpose Find		~	Salary Plan			Po:	ind		~	Position Planning Other Labor Total Compensation	Selery \$ 154,313.66 \$ 128,739.00 \$ 283,052.66	Benefits \$ 71,290.26 \$ 9,085.76 \$ 80,376.02	Total \$ 225,603.92 \$ 137,824.76 \$ 363,428.68
Department Owne	d Positions							_					
Salary Plan	Positions	Employee ID	Employee Name/Description	Primary Department	Pay Department	Fund Type	Salary Account	Fringe Benefit Account	c	lass	Purpos	50	Final Salary Ber
202-Professional, Full	10008655-Assoc Policy Scientist	700836237	Colbert,Annastasia	01003-COMMUNITY	01003-COMMUNITY	11 - Basic Budget	120200 - PROFESSIONAL STA	129100 - FB CHARGES - EXE	011	PROV112156	6-01003-PARTNER IN	PUBLIC EDUC CEI	\$ \$.
202-Professional, Full	10000231-Assoc Dir, Community	700873590	Moore,Leann	01003-COMMUNITY	01003-COMMUNITY	31 - Sponsored Acti	vity 120200 - PROFESSIONAL STA	129100 - FB CHARGES - EXE	005	PROV317779	9-01003-01003 3X-42	-43 C&G BUDGETING	\$\$.
202-Professional, Full	10007779-Communications Speci	999999999		01003-COMMUNITY	01003-COMMUNITY	17 - Reserves	120200 - PROFESSIONAL STA	129100 - FB CHARGES - EXE	017	PROV177775	9-01003-01003 1-7 B	UDGETING	\$ 0 \$.

8.6 gives you a very granular view of labor for a particular Department (DeptID). The report is laid out on multiple cards:

1) **Department Owned Positions** – The position's home is the selected Primary Department and the charges reside in the same selected Department.

- 2) Department Owned / Paid Elsewhere The position's home is selected, but the charges flow to a different department. These dollars are not included in the selected Department budget nor are they in the grid in the upper right.
- 3) **Shared Positions** The position's home is elsewhere, but the charges flow to the selected Department.
- 4) Other Labor

The summary grid in the upper right of the report sums up 1, 3 and 4 above and should reflect the total compensation budget for the College/Unit or Department selected. It should also match the salary data on 8.3 and 8.4.

Select the "Export for Labor Tie-Out" button if you want to export the data into Excel

Export for Labor Tie-out Report

8.6b Labor Distribution to Budget Tie-Out College/Unit Level

< 8.6b Labor Distribution to Budget Tie-Out College Level $\, \diamondsuit \, \sphericalangle \, \bigstar \,$

College / L	Jnit			F	und Type Category			P	urpose			Show All Units	
ENROLL	MENT MA	NAGEMENT		× ~	Find			~	Find		~		
Salary Plar	n			(Position								
													Salary
Find					Find			~				Position Planning	\$ 6,468,55
												Other Labor	\$ 663,84
												Total Compensation	\$ 7,132,40
College/U	Jnit Owr	ned Positions											
Salary	Plan	Positions	Employee ID	Employee Nan	e Primary Department	Pay Department	Fund Type	Salary Accour	nt Fringe Benefit Account	Class		Purpose	
202-Profes	ssiona	10003225-Deputy Registrar	13687	Quinci,Carolyn	06220-OFC OF UN	06220-OFC OF UN	11 - Basic Budget	120200 - PROFE	S 129100 - FB CHARGES - EXEMPT	015	REGI110000-062	20-OFFICE OF UNIV REG	ISTRAR
245-None:	xempt	10001982-Admissions	16011	Grzenda,Scott	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	124500 - FT 37.5	5 129200 - FB CHARGES-NON EXEMP	. 420	ADMS110000-01	601-ADMISSIONS OFFICE	E
202-Profes	ssiona	10002309-Deputy Director	17951	Edmonds,Darrell	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	120200 - PROFE	S 129100 - FB CHARGES - EXEMPT	500	ADMS110000-01	601-ADMISSIONS OFFICE	E
230-Salari	ed Sta	10007797-Administrative	23570	Lewis,Kelly	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	123000 - SALAR	IE 129300 - FB CHARGES - NON EXEM	418	ADMS110000-01	601-ADMISSIONS OFFICI	E
202-Profes	ssiona	10000469-Assoc Registrar	25751	Byrd,Dawn	06220-OFC OF UN	06220-OFC OF UN	11 - Basic Budget	120200 - PROFE	S 129100 - FB CHARGES - EXEMPT	006	REGI110000-062	20-OFFICE OF UNIV REG	ISTRAR
245-Nones	xempt	10007690-Admissions	26130	Hammer, Daniel	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	124500 - FT 37.5	5 129200 - FB CHARGES-NON EXEMP	. 409	ADMS110000-01	601-ADMISSIONS OFFICI	E
202-Profes	ssiona	10008161-Asst Director,	28729	Travis,Laura	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	120200 - PROFE	S 129100 - FB CHARGES - EXEMPT	064	ADMS110000-01	601-ADMISSIONS OFFICI	E
202-Profes	ssiona	10001528-Asst Director,	30452	Bastien,Erin	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	120200 - PROFE	S 129100 - FB CHARGES - EXEMPT	008	ADMS110000-01	601-ADMISSIONS OFFICI	E
202-Profes	ssiona	10000914-Asst Director,	33813	Foster,Stephan	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	120200 - PROFE	S 129100 - FB CHARGES - EXEMPT	021	ADMS110000-01	601-ADMISSIONS OFFICI	E
202-Profes	ssiona	10007789-Asst Director,	34554	Burke Jackson,Lo	orrie 04709-ENROLLME	04709-ENROLLME	11 - Basic Budget	120200 - PROFE	S 129100 - FB CHARGES - EXEMPT	012	STFS112112-047	709-ENROLLMENT SERVIC	CES
202-Profes	ssiona	10002727-Assoc Registrar	43424	Henker,Diane	06220-OFC OF UN	06220-OFC OF UN	11 - Basic Budget	120200 - PROFE	S 129100 - FB CHARGES - EXEMPT	004	REGI110000-062	20-OFFICE OF UNIV REG	ISTRAR
230-Salari	ed Sta	10001460-Administrative	46076	Clark,Teresa	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	123000 - SALAR	IE 129300 - FB CHARGES - NON EXEM	405	ADMS110000-01	601-ADMISSIONS OFFICI	E
230-Salari	ed Sta	10001460-Administrative	46076	Clark,Teresa	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	123000 - SALAR	IE 129300 - FB CHARGES - NON EXEM	905	ADMS110000-01	601-ADMISSIONS OFFICI	E
202-Profes	ssiona	10007618-Director,	47836	Santos,Krystal	01601-ADMISSION	01601-ADMISSION	11 - Basic Budget	120200 - PROFE	S 129100 - FB CHARGES - EXEMPT	061	ADMS110000-01	601-ADMISSIONS OFFICI	E

8.6b is similar to 8.6, but it presents a view of labor at College or Unit level instead of at the DeptID level. The particular College/Unit can be selected in the filter.

- 1) **College/Unit Owned Positions** These are positions are owned/planned and paid by the selected College/Unit.
- College/Unit Owned / Paid Elsewhere These positions are owned/planned by the selected College/Unit but are partially or fully paid by another College/Unit. These budget dollars are not included in the selected College/Unit and not included in the grid in the upper right.

3) **Shared Positions** – these are positions owned/planned by another College/Unit but are partially or fully paid by the selected College/Unit.

4) Other Labor

The summary grid in the upper right of the report sums up 1, 3 and 4 above and should reflect the total compensation budget for the College/Unit selected. It should also match the salary data on 8.3 and 8.4.

8.7 Budget Tie-Out

The Budget tie-out report has the most granular level of detail available for the proposed budget, including a comment field. To remove from view those items with zero dollars, click on the "Filter Zeros" filter at the right. To export the data into Excel, select the "Export Data to Excel" button.

< 8.7 Bu	dget Tie-ou	t ¢ < ☆						F	FY25 Budget 🗸	Reset	[Additional insights
Q Find									Ģ) 🗗 🏹	↑↓ ⊚ ・	T Notes
Employee Name	↑ Employee ID	Model Source Area	Budget Rollup	GL Account	Department	Fund Category	Amount	Amount Flipped Sign	Account has Flipped Signed?	Amount Balanced	Comments	If you see comments seperated by commas then it was a comment put
		Other Labor Planning, Salary/Wage Amount	PBRL11215 5-07201-DIG ITAL COMM UNICATIONS	126000 - ST UDENT LAB OR	07201-COM MUNICATIO NS & MARKE TING	Basic Budget	\$ 3,154	\$ 3,154		\$ 3,154		on a multiple line input grid.
		Other Labor Planning, Salary/Wage Amount	PBRL17777 7-07201-07 201 1-7 BUD GETING	120298 - BU DGT ONLY-P ROF SAL OF FLOAD	07201-COM MUNICATIO NS & MARKE TING	Reserves	(\$ 132,889)	(\$ 132,889)		(\$ 132,889)		Export Data to Excel
		Other Labor Planning, Salary/Wage Amount	PBRL21212 3-07201-R/E PARENT GUI DE	120500 - OF F-CAMPUS - PROFESSIO NAL	07201-COM MUNICATIO NS & MARKE TING	Self Supporti ng	\$ 1,800	\$ 1,800		\$ 1,800		Show All Units
		Other Labor Planning, Salary/Wage Amount	PBRL21213 2-07201-R/E UD EVENTS CALENDAR UBIT	120500 - OF F-CAMPUS - PROFESSIO NAL	07201-COM MUNICATIO NS & MARKE TING	Self Supporti ng	\$ 550	\$ 550		\$ 550		V Filter Zeros
		Other Labor Planning, Salary/Wage Amount	PBRL21214 4-07201-R/E MESSENGER ADVERTISIN G	120500 - OF F-CAMPUS - PROFESSIO NAL	07201-COM MUNICATIO NS & MARKE TING	Self Supporti ng	\$ 12,629	\$ 12,629		\$ 12,629		Find V
		Other Labor Planning, Salary/Wage Amount	PBRL21214 4-07201-R/E MESSENGER ADVERTISIN G	125200 - MI SC WAGE-IN CL PRT-TIME NON UD	07201-COM MUNICATIO NS & MARKE TING	Self Supporti ng	\$ 12,812	\$ 12,812		\$ 12,812		Find v
		Other Labor Planning, Salary/Wage Amount	PBRL21214 6-07201-R/E SPECIAL PU BS ADS UBIT	120500 - OF F-CAMPUS - PROFESSIO NAL	07201-COM MUNICATIO NS & MARKE TING	Self Supporti ng	\$ 3,750	\$ 3,750		\$ 3,750		07201-COMMUNICATIONS & MA X V Purpose Find V
		Other Labor Planning, Salary/Wage Amount	PBRL21215 1-07201-R/E UD BUS ADV ERTISING	120500 - OF F-CAMPUS - PROFESSIO NAL	07201-COM MUNICATIO NS & MARKE TING	Self Supporti ng	\$ 6,007	\$ 6,007		\$ 6,007		Financial Statement Line Item SALARIES AND WAGES X V

General Tips & Tricks

Budget Period Selection

< 4.1 Current Position Planning 💠 < ★		FY24 Budget 🗸 Reset 🛛 戻 \cdots
ELAVAJADE	Current Position Planning	4.1b Position Planning Details >
Home vs Shared Position Pay		Departments Submitted for Appro
Shared Position Fringe Be	nefits: \$ 613,907 (11.0%)	Submitted?

The Budget Period Selection is usually at the top right of every page and signifies what Budget is currently open for input. **For now, users do not need to adjust this selection**.

Refreshing the Screen

If a user is looking at a page while changes are being made to that same page by another user, the user must hit refresh to see the changes. Changes are saved automatically (no save button), but might require a screen refresh if two users are looking at the same screen at the same time.

Places to refresh

The user can either refresh the browser screen (browser refresh icon) or just refresh the card (card refresh icon).



lcons

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		Format Grid >	Row height
		\$ 5,400	Font size >

In Anaplan you will usually see a list of icons in the upper right part of a section that you can use to better view/manipulate the data.

Q Search – to search for a particular item in a list ᠑ Cell History – lets you see the history of a cell <u>ک</u> Pivot – allows the user to select the row and column views (i.e. like in an Excel pivot table) Y Filter – to filter the data based on a condition (true, false, equal to, less than, greater than, etc) ĵ₽ Sort – sort the column (ascending or descending) Show / Hide C) Export – to export the screen data (i.e. to Excel) щ Copy Across – to copy across columns Ξŀ Copy Down – to copy down rows Maximize/Minimize Section Size ••• Ellipsis (three dots) – Format Grid / Row Height or Font Size

Maximize/Minimize Section Size



Some sections can be maximized by clicking the above icon which should appear in the top right of the section you are on. Note: the secondary refresh icon will disappear when this is done. To minimize a section, click on the minimize icon below (which should be at the top right of the screen.



Copy / Paste Data

To copy data down a column, go to the top cell in a column, Copy, then go to bottom, hold shift and click the last item, then Paste.

You can also use the "Copy Across" or "Copy Down" icons at the upper right to copy data across or down.



Pivot

The user can view different layouts of rows and columns via the Pivot icon



Pivot da	ta	×
Context s	selectors	
:: ::	Budget Versions	
∷ fx	Line Items	
Columns		
:: ::	D1 Unit	۲
Rows		
	A2 GL Rep Account	۲

Pivot Reset

If you have done a pivot, you will see a blue underline under the icon. Click on the icon and select "Reset Pivot" at the bottom.

Q. 7[[] ¹ ⊚ ↓ ⁷	Ę
Pivot data	×
Context selectors	
∷∷≣ Budget Versions	
Columns	
ii fix Line Items	
Rows	
::: : E L1 EmplID ()	
Reset pivi	ot

Select All Items / Deselect All Items - Shortcut

A shortcut for selecting all items in a list. Instead of clicking them one-by-one, click on the column header and press the space bar. If you press the space bar again, it will do the opposite (select or deselect).

B Department to View		Department to View	
	Include in Report?		Include in Report?
		00605-EMPLOYEE HEALTH & WELLBEING	v
00605-EMPLOYEE HEALTH & WELLBEING		01910-(R-TO 3750)HLTH & EXERCISE SCI	*
01910-(R-TO 3750)HLTH & EXERCISE SCI		02591-PHYSICAL THERAPY	*
02591-PHYSICAL THERAPY		03701-DEANS OFC-HEALTH SCIENCES	~
03701-DEANS OFC-HEALTH SCIENCES		03702-UNIVERSITY WELLNESS	v
03702-UNIVERSITY WELLNESS		02704 CHS EVENTS	
03704-CHS EVENTS			
03705-CTR ASSESSMNT RSCH/TRANSLATION		03705-CTR ASSESSMINT RSCH/TRANSLATION	•
03706-INTERDISC EDUC RSCH & PRGRMS		03706-INTERDISC EDUC RSCH & PRGRMS	•
03707-HEALTH CENTERS		03707-HEALTH CENTERS	✓
03708-NURSE MANAGED PRIMARY CARE CTR		03708-NURSE MANAGED PRIMARY CARE CTR	✓
03709-CHS IT		03709-CHS IT	✓
03711-CHS COMM & MARKETING		03711-CHS COMM & MARKETING	~
03712-CHS UNDERGRAD SERVICES		03712-CHS UNDERGRAD SERVICES	✓
03713-CHS RESEARCH SUPPORT CENTER		03713-CHS RESEARCH SUPPORT CENTER	✓
03714-CHS RESEARCH ADMIN		03714-CHS RESEARCH ADMIN	✓
ANTE CHE SPECIAL PROCRAME		03715-CHS SPECIAL PROGRAMS	

You can delete dates by clicking on the cell once to highlight it, then "backspace" key and then clicking "enter" or "tab".

Section 6 – approve button only approves, reject button only rejects... so it's OK to check on a bunch of DeptID's then click both buttons.

APPENDIX

Add Pages to Favorites

🔥 Apps 👻 Bu	dget Tum Around (BTA) 🐱	University of Delaware 🗸 📿 🛱 ? MT
Budget *	Turn Around (BTA)	🖗 Manage this app
QUICK ACCESS	2	Import dashboard Create page
Most recent 6 Favorites 1	> Most recent	
My Pages 3	> Favorites	
CATEGORIES +	✓ My Pages	1
0. Data & Data 8 Exception Dashboards	麗 3.1 Calculation Engine Overview (My Page 1)	0 ☆ …

- 1. To favorite a page from the app contents screen, click the star icon on the far-right of the name of the page as seen above.
- 2. As you begin to use Anaplan and click on different pages, those pages will show up in the 'Most Recent' card.
- 3. To view the 'Most Recent' and 'Favorite' pages click the '>' to the left of the category name.

Banner Tab Features and Navigation

The **Banner Tab** on the page has many useful features.

A	Apps Budget T	am Around (BTA) 🗸	University Of Delaware 👻 🔍 👫 💡
	Home		
В	Apps	n / md (BTA)	🗘 Manage this app
*	My Pages		
	Models		
	Assots		
QUICK	PlaniQ		Import dashboard Create page
Most r	DocuSign	estresent	
Favori	Administration	ost recent	
My Pa	Predictive Insights New	ivorites	
	CloudWorks		
CATEG	App Hub 🛃	y Pages	

- 1. Click on the word "Apps" or use the light blue drop-down arrow to go back to the Homepage.
- 2. Use the dark blue drop-down arrow when on a page to select and go to a different page.
- 3. The initials icon (e.g., 📧) can be used to view Account information or log out.
- 4. The ? icon can be used to go to the Help card for any Anaplan related questions.
- 5. The ^Q icon allows you to view your notifications (e.g., when you are mentioned in a comment, something is shared with you, or anything related to your Anaplan account).



6. The \bigcirc icon allows you to complete a system-wide search for pages, apps, and models.

Page Level Features

After you click on the page from the Apps list view, a page view will open. There are many useful features that you can access from here.

Apps 🗸	Budget Turn Arou	1 14	3	4. Position Planning / 4.1 Current Position Planning 🗸	
4.1 Current Po	osition Planning 🤇) < 1	*		
		2			

- 1. **Refresh** This can always be found next to the name of the current page. You can use this feature to refresh the page as necessary.
- 2. **Share** This can be used to share the page. Once this is clicked, you can copy the URL link, or you can share the page via email with an option to write a message.
- 3. **Favorite** You can favorite any page using this icon, to make it more easily accessible from the page list view.



4. **Page Selector** – Many pages have dropdown lists with differing options that can be used to filter data seen on a page to a particular dimension (e.g., time, department, fund type, etc.).

- 5. **Reset** This option allows you to reset your page selector options so the page reverts to not being synced to any selected data.
- 6. **Comment** This comment feature, further explained in another section, can be accessed from the top right of a page as well.
- 7. **Page Options** Click on the ellipsis (...) to find more options, such as 'Export as PDF,' to view the whole page as a PDF. Depending on your permission level or role in Anaplan, you may also see the option to view the source model for the page.

Maximize a Card View

The ability to maximize a card is a useful feature to magnify the view of the card and its details.

1. Hover over the card that you wish to see an enlarged view of, and the icon tray appears.

											Q	YLAU) (E)
ployee Level Inputs													Maxi
	Position ID	Position Type	Salary	End Date	Rank/Retenti Faculty/Prom Effective	Distribution Override Effective	FTE Override Effective Date	Base FTE	Override FTE?	New FTE	Final FTE	Number of REG	Number o ADMIN
Keeler, Calvin	10003122	Interim Dean	\$ 268,584					1		0	1	1	
Koono Grogory	10000730	Manager, Computing Ops	\$ 83 176					1		0	1	1	

2. Click the *content is the content of the second second*

				FY24 Bud	get ♀ , [⊭]
			<u>ا</u>	₹ ♀ ↑↓ @	D 🖪 🖳
erride FTE?	New FTE	Final FTE	Number of REG	Number of ADMIN	Number of 1/9

3. To minimize the card and revert it back to its original size, click on the $\lfloor x \rfloor$ icon.

Add Input to Editable Cells in the Grid Card

Some grid cards have cells that are editable, depending on access provided to your role in Anaplan. In many cases, required fields show red and optional fields show yellow.

1. To add or edit information in a cell, double-click on it, make your edits, then push 'Enter'.

						1	Q. \\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$ \$\$
Employee	Earnings Code	Budget Purpose	Account	Class	Class Lookup	Create Distribution?	Error Message
~							Please fill out all fields
							Please fill out all fields
	4						Please fill out all fields
	1		R				

The new value entered will show purple.

- 2. Some editable cells contain a dropdown menu. Click the dropdown arrow to choose from the pre-populated options. You can also type into these dropdowns to search for the desired item in the list.
- 3. You can undo the input into the cell only once using keyboard shortcut 'CTRL+Z'. Anaplan cells are functional like Excel cells; you can also click on the cell, then type the 'Delete' or 'Backspace' key on your keyboard.

Note: If you make any changes to a cell and navigate to another page, the new value will be saved.

Troubleshooting Tip:

If you encounter a red diamond ' • on the cell, it indicates that data has changed but has not been processed by the model. This could be because your internet connection was disrupted, or the model was processing other changes at the same moment. Although rare, if this occurs, simply refresh the page, and edit the cell again.

Show History on a Cell in the Grid Card

'Show history' is a useful feature that can be used to show the last changes made to that cell within the last 24 hours, last 7 days or last 30 days. This feature is only available for an editable cell on a grid card.

If you make any changes to an editable cell and navigate to a different page, these new values will be saved. As you work in Anaplan navigating from page to page, the 'Show history' feature will come in handy to see any changes you or others may have made.

- 1. Right-click on the cell in which you would like to see history.
- 2. Click on "Show history".
- 3. A dialog box opens, prompting you to choose the timeframe for history of changes.
- 4. Once a selection has been made, the "Cell history" pop-up window will display.

% Growth					
1			_		0%
	Сору	Ctrl	С		0%
	FI Paste	Ctrl	V		0%
	G	our	-		0%
	U Copy across				0%
	Copy down				0%
					0%
	Breakback		>		0%
	Show history	2	>	Last 24 hours	
	St Drill down	F	8	Last 7 days	
% Growth Override				Last 30 days 3	
0.0000000000000000000000000000000000000				All	
	0%			Data rango	0%
	0%			Date range	0%
	0%				0%

Drill Down on a Cell in the Grid Card

Drill down is a feature available on cells in a grid card if they are formula based (not imputable). Based on the permissions in Anaplan, you can see the drill down option.

AGCM110000 & 129500 - FB CHARGES - OTHER & OP		-	A 4 4 4 4		
AGCM110000 & 130000 - BUDGETING ONLY-TRAVEL & TRANSP & OP	1	O	Сору	Ctrl	С
AGCM110000 & 140000 - BUDGETING ONLY-SUPPLIES & EXP & OP		Ē	Paste	Ctrl	V
AGCM110000 & 141000 - OFFICE SUPPLIES & OP					
AGCM110000 & 141015 - CLASSROOM SUPPLIES & OP		Щ.	Copy across		
AGCM110000 & 141214 - COMPUTER HARDWARE AND SUPPLIES & OP		≣⊾	Copy down		
AGCM110000 & 141215 - OFFICE ACCESSORIES AND SUPPLIE & OP					
AGCM110000 & 141245 - COMPUTER SYSTEMS SOFTWARE & OP			Breakback		2
AGCM110000 & 142200 - PROMOTIONAL & OP			Rename		
AGCM110000 & 144000 - ADVERTISING SERVICES & OP			Delete		
AGCM110000 & 144300 - PRINTING SERVICES & OP			Delete		
AGCM110000 & 147000 - COMPUTER COMMUNICATIONS DEVICE & OP			Change pare	nt	
AGCM110000 & 147500 - PHOTOGRAPHY COSTS & OP			Insert multiple	e items	
AGCM110000 & 147700 - POSTAGE AND MAIL SERVICE & OP			moeremanipa	e items	
AGCM110000 & 148400 - COMPUTER SYSTEMS SOFTWARE & OP		9	Show history		2
AGCM110000 & 149600 - (D)COMPUTER HARDWARE & SUPPLIE & OP		21	Drill down		-0
AGCM110000 & 150000 - RUDGETING ONLY-OCCUP & MAINT & OP	2	≈+	Drin GOWIT	-	-0

- 1. Right-click on the cell in which you would like to view the drill down.
- 2. Click "Drill down."

3.1 Calculation Engine Overview 💠 🛸 🏠		FY24 Budget V Final Amoun	: 🗸 Reset 🖉 … 🗈	Drill down	5	×
Find		۵. ۲	Ү ᡎ ⊚ টৣ Щ ≣⊦ …	Formula		
	FY22	FY23	FY24	fx CAL01 - Budgeting Engine.Final Amount	Calculation nt =	
AGCM110000 & 129500 - FB CHARGES - OTHER & OP	\$ 1,149	\$ 1,600	\$ 1,600	IF ITEM(Time) =	SYS16 - Bu	Idget
AGCM110000 & 130000 - BUDGETING ONLY-TRAVEL & TRANSP & OP	\$0	\$ 5,400	\$ 5,400	Baseline ELSE IF	ITEM(Time)	<
AGCM110000 & 140000 - BUDGETING ONLY-SUPPLIES & EXP & OP	\$0	\$ 50,000	\$ 50,000	'SYS16 - Budget V	Version'.Bu	dget
AGCM110000 & 141000 - OFFICE SUPPLIES & OP	\$ 36.92	\$0	\$0	Year - 1 THEN Act	tuals ELSE	%
AGCM110000 & 141015 - CLASSROOM SUPPLIES & OP	\$ 213.1	\$0	\$0	Formula values		
AGCM110000 & 141214 - COMPUTER HARDWARE AND SUPPLIES & OP	\$ 1,750	\$0	\$0			
AGCM110000 & 141215 - OFFICE ACCESSORIES AND SUPPLIE & OP	\$ 125	\$0	\$0	CAL01 - Budgeting Calculation		Engi
AGCM110000 & 141245 - COMPUTER SYSTEMS SOFTWARE & OP	\$ 257	\$0	\$0			
AGCM110000 & 142200 - PROMOTIONAL & OP	\$ 32,376	\$0	\$0		FYS	22
AGCM110000 & 144000 - ADVERTISING SERVICES & OP	\$ 79.88	\$0	\$0			
AGCM110000 & 144300 - PRINTING SERVICES & OP	\$ 3,828	\$0	\$ C	seline		\$0
AGCM110000 & 147000 - COMPUTER COMMUNICATIONS DEVICE & OP	\$ 24.22	\$0	\$ C	tur"		51,149
AGCM110000 & 147500 - PHOTOGRAPHY COSTS & OP	\$ 437.5	\$0	\$0	"Gre Li Copy	CITIC	0
AGCM110000 & 147700 - POSTAGE AND MAIL SERVICE & OP	\$ 52.45	\$0	\$0	\$ Inp 🗊 Paste	Ctrl V	\$0
AGCM110000 & 148400 - COMPUTER SYSTEMS SOFTWARE & OP	\$ 2,296	\$0	\$0	FY24 PL Drill down	50	
AGCM110000 & 149600 - (D)COMPUTER HARDWARE & SUPPLIE & OP	\$ 401.4	\$0	\$0	AGCN	Po	3 - OTH
AGCM110000 & 150000 - BUDGETING ONLY-OCCUP & MAINT & OP	\$0	\$ 1,350	\$ 1,350	1 miles		
AGCM110000 & 151800 - LOCK SHOP & OP	\$ 36.33	\$0	\$0	HBudget Year: SY	4 et V	/ersion
AGCM110000 & 154800 - TELEPHONE-EQ RENTALS & OP	\$ 360	\$0	\$ 0			
AGCM110000 & 190800 - MISC INTER-DEPARTMENTAL CREDIT & OP	\$ 115.9	\$0	\$0			
AGCM112113 & 129500 - FB CHARGES - OTHER & OP	\$ 1,498	\$ 1,600	\$ 1,600			
AGCM112113 & 130000 - BUDGETING ONLY-TRAVEL & TRANSP & OP	\$0	\$ 4,500	\$ 4,500	FY24 Budget	FY24	

- 3. A separate dialog box will open to the far right of the screen. Different drill down details are available based on the data in the cell chosen.
- 4. (Optional) You can continue to drill down further by right clicking another cell from the *Drill down* panel on the right. Your pathway will be captured for easy navigation.
- 5. To exit out of the 'Drill down' dialog box, click the 'X'.

Add Comments to a Card

The ability to add comments to a card is a useful feature to drive communication and collaboration.

< 4.1a Add New Distribution $\diamondsuit \preccurlyeq \bigstar$	1	
ELAWARE.	Add New Position Distribution	
4.1 Current Position Planning > Fill out the fields below and check the 'Create New Distribution?' box. When the distribution, click the button the the right. You can then use the link in the top	he "Error Message' cell on the right indicates that you are ready to create the new left of this box to navigate back to the position planning dashboard.	Create New Distribution

- 1. Hover over the card where you would like to add a comment.
- 2. Click the comment icon, as shown above.

4.1 Current Position Fill out the fields be are ready to creat back to the position	on Planning > below and check the e the new distributio on planning dashboa	'Create New Distribi n, click the button th rrd.	ution?' box. When the the right. You can	ne "Error Message' then use the link i	cell on the right in n the top left of thi	ی ۲ اور	Create New Distribution	3
Employee	Earnings Code	Budget Purpose	Account	Class	Class Lookup	Create Distribution?	Error Message	
							Please fill out all fields	
							Please fill out all fields	
								No comments. Comments added to a card display here.
		127. 0-04. 18750-20170						(#seannicidonald training comment Cancel > Post

- 3. A dialog box opens to the right of the screen, with the name of the card at the top.
- 4. Type your comment in the text box, then press "Enter" on your keyboard or click "Post".
 - Note: You can tag another Anaplan user in the comment using '@' followed by ther email, which will trigger a notification to that user.
- 5. To read comments on a card, hover your cursor over it and click on the comment icon. All comments posted for that card will be visible as a thread to the right of the screen.

Export Tables and Charts

Grid and/or chart cards can be exported into various image file types (PNG, JPEG, or SVG) and nonimage file types (.xlsx, .xls, .csv, .txt and .pdf formats).

- Note: Only grid cards can be exported as non-image file types: .csv, .txt, .xls, .xlsx, .pdf
- > Note: Only chart cards can be exported as PNG, JPEG, or SVG

Export Grid Cards



- 1. Hover over the card, then click on the ellipsis (...) icon as shown above.
- 2. Hover over "Exports" then click "Export this view."



- 3. The *Export View* pop-up window opens.
- 4. You can choose from various file formats for your export. You can also choose whether to include or exclude empty rows.
- 5. Once appropriate selections have been made, click the blue "Export" button.
- 6. The export file downloads to your hard drive.

Export Chart Cards

- 1. Hover over the card and click on the (...) ellipsis icon as shown below.
- 2. Hover over "Exports" to see a list of available image export options.

lome vs Shared Position Pay		Print chatt	Exports >]
Home Dept Salary Home Dept Fringe Benefits	Home Dept Salary: S 0 (0.0%) Home Dept Fringe Benefits: S 0	Download PNG image Download SVG vector image	Source module REP01 - Home vs Shared Department Breakout	tted?
 Shared Position Salary Shared Position Fringe Benefits 		Download JPEG image		

Search in a Card

In addition to the global search mentioned in the *Banner Tab Navigation* section above, you can complete a keyword search at a card level. This feature is helpful when you need to access data quickly from a card with many line items or columns.

			1					2		Q	Ү 🗗 ∿
Position ID	Position Type	Salary	End Date	Rank/Retenti Faculty/Prom Effective	Distribution Override Effective	FTE C Effective Date	Base LIE	FTE?	NEWFIE	Filidi F I E	Number o REG
	Position ID	Position ID Position Type	Position ID Position Type Salary	Position ID Position Type Salary End Date	Position ID Position Type Salary End Date Rank/Retenti Faculty/Prom Effective	Position ID Position Type Salary End Date Rank/Retenti Distribution Effective Effective	Position ID Position Type Salary End Date Effective Effective Effective Date	Position ID Position Type Salary End Date Effective Effective Effective Date Date	Position ID Position Type Salary End Date Rank/Retention Distribution FTE O GQ Find C Position ID Position Type Salary End Date Find Effective Effective Effective Effective Effective FTE?	Position ID Position Type Salary End Date Faculty/Prom Effective Override Effective Effective Date Paseric FTE?	Position ID Position Type Salary End Date Effective Effective Effective Effective Effective Page FIE FIE? FIE? FIE?

- 1. Hover over the card and click on the magnifying glass icon.
- 2. Type the keywords you are searching for and click "Enter".

Filter a Row or Column in a Card

You can use Anaplan's filtering functionality on any grid card. Some cards contain columns with specific filtering functionality. As an example, the steps below outline the process to filter to Departments Submitted for Approval? - "Submitted?" on 4.1



Filters	×
Submitted?	2 1
Select condition	00
Select a new column or row to ad	d another filter
Select a new column or row to ad	d another filter
Select a new column or row to ad	d another filter

- To apply the filter, click the "Submitted?" column, then click on the

 filter icon in the top
 right corner of the grid, OR you can click on the

 filter icon first then select the
 "Submitted?" column.
- 2. Once the filter has been selected, a grid on the right will appear and will allow you to set the filter criteria. In this example, select the "Is true" option and click "Apply" in the bottom right corner.

Show/Hide a Row or Column in a Card

If there are specific columns, rows, or "dimensions" (the header row, column, and/or page selector within a grid that define the context for the data in the cells) that you would like to either hide or show, click on the [®] "show / hide" button next to the "filter" button.

- 1. Click on the [®] icon in the top right corner of the grid.
- 2. Select what you would like to see or hide from the dropdown.
 - Note: Selecting "Line Items" will let you select the data points you want to see. In the example above, the "line items" are "Position Description", "Earnings Code", etc
 - Note: Selecting "L2 EmpID-Purpose-Account-Class" will allow you to focus only on employees and their distributions you care to see and will hide all others. You can use the "Find" search box to find an item(s) you want to see. Once you've made your selection, click "Apply" in the bottom right corner.
 - Note: Selecting "Show all rows" or "Show all columns" can be used to undo your current selections and give you full visibility to everything that was previously visible within the grid.
- 3. In the *Levels* section, you can choose to show or hide the roll-up of your selection.
 - Note: For the "L2 EmpID-Purpose-Account-Class" selection, unchecking the "L2 EmpID-Purpose-Account-Class" box will remove the employee distributions from the

grid, and you will only see the "L1 EmplID" summary rows (i.e., you will no longer see individual distributions and will only see the L1 Employees lines that the distributions roll up to.) Inversely, if you choose to only show the "L2 EmplD-Purpose-Account-Class", it will remove the L1 Employee summary rows in the grid.

- Note: For the "Line Items" selection, unchecking the "Line Item (Summaries)" box will remove the total/summary rows (typically found at the bottom of the grid). Inversely, unchecking the "Line Item (Details)" box will leave only the total/summary rows and remove all the individual rows.
- 4. Click the "Apply" button at the bottom of the page to apply your changes.

Step 1 – select a College/Unit

Step 2 – look under the "Department Details" tab to the see the approval status of all DeptID's and whether Labor and Budgeting have both been approved.

Step 3 – if all Departments have been approved, add checkmarks to both "Finalize Budgeting" and "Finalize Labor"

Step 4 – Click on the "Finalize Labor" and "Finalize Budgeting" buttons to lock all the DeptID's down.