

Anaplan Reporting & Budgeting

Training Documentation

Anaplan is a newly implemented, cloud based tool that enables financial planning, budgeting, and analysis. This easy-to-use tool will be used to fulfill budgeting and reporting needs across various units on campus.

The following topics will be discussed throughout this manual:

- Logging into Anaplan
- Reporting
- Budget Workflow, Entry, & Reporting
- Salary Recommendation Process
- Anaplan General Navigation & Tips

Important Items to Note

- No saving required! Anaplan saves all information automatically.
- All data entry cells are recognizable by blue formatting.
- Data can be copied and pasted straight from Excel.
- Dashboards and data modules can easily be exported to Excel, Adobe, and other formats.
- Blue instruction boxes can be found throughout the dashboards to provide guidance.

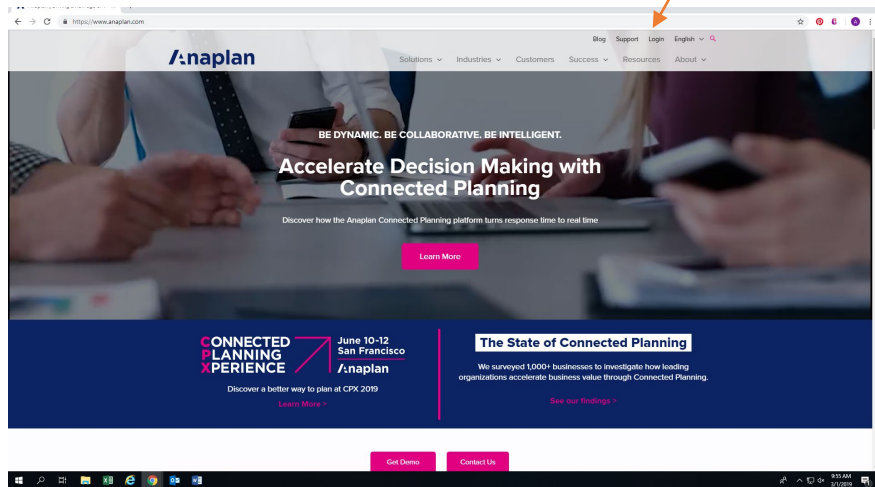
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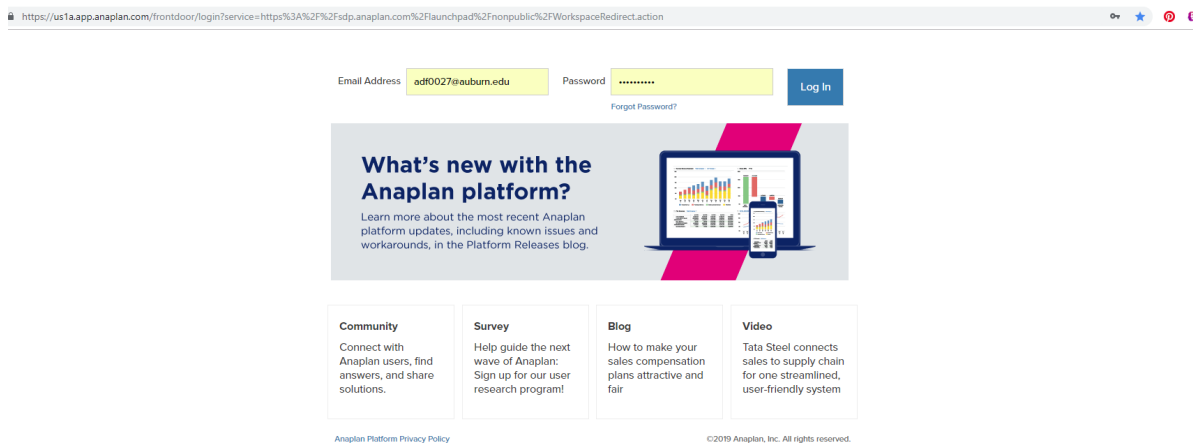
Logging into Anaplan

To Access Anaplan

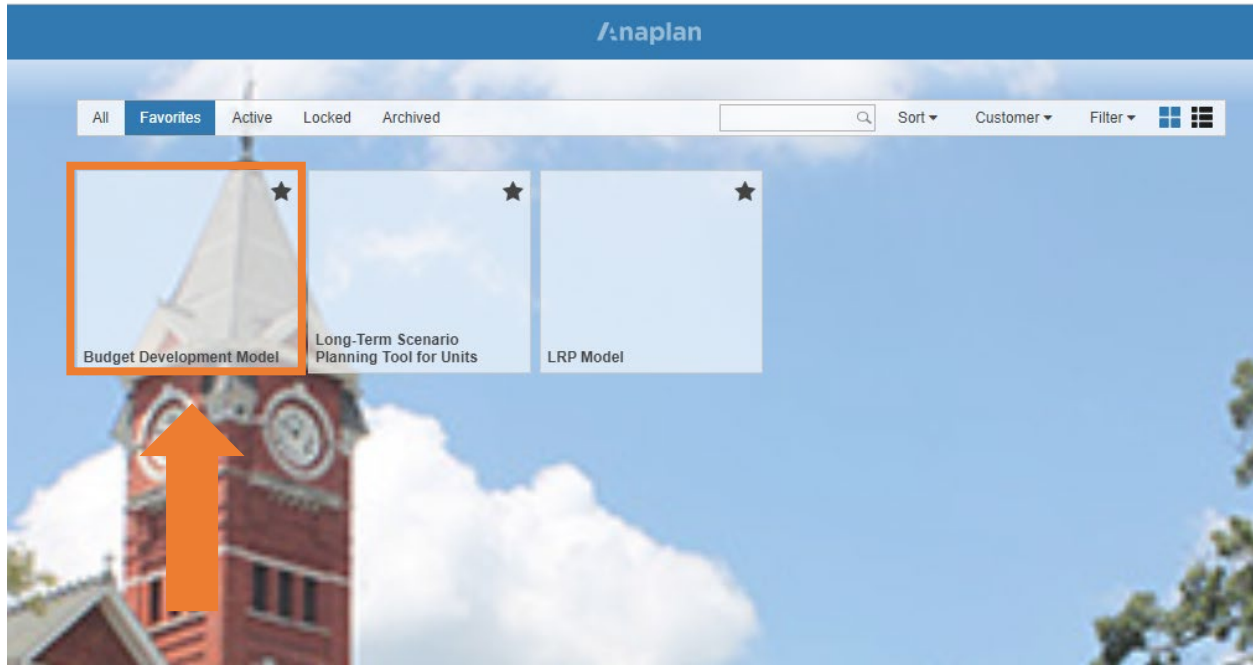
- Go to: <https://www.anaplan.com>
- Click **Login** in the upper right hand corner of webpage.



- Enter **Email Address** and **Password**.



- After logging into Anaplan, select the **Budget Development Model** tile from the available models. The number of available tiles for a particular user will vary depending on the level of access.



Reporting

Upon logging in, Anaplan opens up to a landing dashboard that contains areas segmented based upon functional reporting needs.

Quarterly Reporting Packages

Please click the buttons below to view and export quarterly reports

Go to : Actuals Trend Reporting Go to : Actual vs Budget Analysis Go to : Monthly Actuals Report - Revenue Units

Go to : Variable Proportion Share Go to : Allocation Variable Trends

Actuals Reporting & Navigation

Actuals Summary | FY18 | Total Funds

	14800 - Nursing Administration	14850 - Nursing	School of Nursing
Total Revenues	12,924,357	1,741,605	14,665,962
Total Expenses	2,472,729	4,308,327	6,781,057
Unit Margin	10,451,627	(2,566,722)	7,884,905

Go to : Actuals Report

Quarterly Reporting Packages

Several reporting options are available and can be accessed simply by clicking the blue buttons which display the name of the report. The reports were designed to give various representations of financial data. Available reports include:

Go to : Actuals Trend Reporting

- Graphical representations of current and historical data.

Go to : Actual vs Budget Analysis

- Actual vs. Budget comparison at income statement level year over year.

Go to : Monthly Actuals Report - Revenue Units

- Monthly view of income statement level detail.

Go to : Variable Proportion Share

- Proportional data to illustrate budget allocations as they pertain to a unit.

Go to : Allocation Variable Trends

- Illustrates Variable Trends by various metrics used in the budgeting process

Note: All graphs are customizable by changing the dimension selections found on each graph.

Historical Trend Reports

Total Revenue

▼ FY18 ▼ 14800 - Nursing Administration ▼ Total Funds ▼



Actuals Reporting & Navigation

This reporting segment of the landing dashboard provides a quick, high level financial snapshot of a particular unit. It offers a Gross Margin view by department.

Actuals Reporting & Navigation

▼ Actuals Summary | FY18 ▼ Total Funds ▼

	14800 - Nursing Administration	14850 - Nursing	School of Nursing
Total Revenues	12,924,357	1,741,605	14,665,962
Total Expenses	2,472,729	4,308,327	6,781,057
Unit Margin	10,451,627	(2,566,722)	7,884,905

Go to : Actuals Report

- The Actuals Report, which can be accessed via the above button, gives a full income statement view by total unit, customizable by time period and fund type.

Budget Workflow, Entry and Reporting

Go to the **Budget Workflow, Entry and Reporting** section of the dashboard.

Note: Instructions are located in the shaded boxes next to each action.

Budget Owners, please update the following columns:

- 1) Submission Status (Select from Dropdown) : When you start the process, select "In Progress". When budget is complete for that college, change to "Completed"
- 2) Budget Owner - Enter Comments : Please enter any relevant notes for Approvers
- 3) When you complete the budget for your Unit(s), please use the "Click Here" link to send an email to approvers.

NOTE : when you set the status to "Complete", you will no longer have access to edit budget data for that Unit.

Budget Workflow - Budget Owners	Budget Entry - First Pass	Budget Owner	Submission Status (Select from Dropdown)	Budget Owner - Enter Comments	Send Email to Approvers	Provost Approver	Provost Feedback	Provost Feedback - Comments	Budget Services Approver	Budget Services Feedback
School of Nursing	jan0013@auburn.edu	In Progress			Click Here	jacks14@auburn.edu			budhoff@auburn.edu	

- Select appropriate budget pass.
- Change Submission Status field to **In Progress**.

Go to the **Budget Entry – Revenues and Non Personnel Expenses** section below.

Note: Budget data during the first and second pass of budget submission may be entered at either the high level or detail level at the discretion of the budget owner.

- Select **High Level** or **Detail Level** from the drop down box next to the pass at which data will be entered.

School of Nursing

	Entry at High Level or Detailed?
Budget Entry - First Pass	High Level
Budget Entry - Second Pass	High Level

Click the **Go To** button for the corresponding entry type selected in the drop down box (High Level or Detailed).

Budget Entry - Revenues and Non Personnel Expenses

Budget Entry Process

Step 1: For each pass, please select "High Level" or "Detailed" to the right. If no selection is made, the report below will default to "High Level".
 *For Final Pass, data has to be entered in "Detailed" modules

Step 2: Please click the Budget Entry buttons below to make updates.
 - For High Level, click "Go To: Budget Entry - High Level"
 - For Detailed, click "Go To: Revenue Budget Entry - Detailed" and "Go To: Expense Budget Entry - Detailed"
 - If you need to add a new Fund-Org combination for the Detailed Entry, click "Go to: New Fund-Org Request" and follow the steps on the dashboard

Step 3: View the budget below. For a detailed view of Revenue Allocations and Central Unit Allocations, please click "Go to: Budget Revenue Allocations" and "Go to: Central Unit Allocations"

▼ School of Nursing ▼

	Entry at High Level or Detailed?
Budget Entry - First Pass	High Level
Budget Entry - Second Pass	

Go To : Budget Entry - High Level Go To : Revenue Budget Entry - Detailed Go To : Expense Budget Entry - Detailed Go to : New Fund-Org Request

Go to : FY Full Budget Go to : Budget Revenue Allocations Go to : Central Unit Allocations Go to : Budget Variance Reporting

High Level Entry (First or Second Pass ONLY)

Selecting the **Go To : Budget Entry – High Level** button above to open a budget entry dashboard for revenue and expenses.

- Select the appropriate **budget pass** from the drop down box located at the top of the dashboard.

1) Select Organization
 2) Select Fund Type: Restricted, Unrestricted, Auxiliary and Service Centers
 3) Select Budget Entry Version
 4) Enter data and comments in blue highlighted cells in the Revenue Budget Entry and Expense Budget Entry sections below

▼ School of Nursing ▼ Budget Entry - First Pass ▼ 🔍 🗑️ 🔄

Total Funds ▼

▼ FY Budget

REVENUES

Revenue Center	Total Funds
Undergraduate Resider	4,365,404
Undergraduate Non-Re	4,603,233
Graduate/Professional	1,355,500
Differential Tuition & Co	-
Distance Learning Fees	-
Other Fees (Allocated)	427,626
5100 - Gross Tuition a	10,751,763
7300 - Student Aid (Allo	(1,290,518)
7320 - Waivers (Allocat	(361,896)

- Select a **Fund Type** from the drop down box located at the top of the dashboard.
 - Unrestricted
 - Restricted
 - Auxiliary
 - Service Centers

School of Nursing Budget Entry - First Pass

Total Funds

Search

Total Funds

- Unrestricted
- Restricted
- Auxiliary
- Service Centers

FY20			
Unrestricted	Auxiliary	Service Center	Total Funds
-	-	-	4,365,404
-	-	-	4,603,233
-	-	-	1,355,500
-	-	-	-
-	-	-	427,626
-	-	-	10,751,763
-	-	-	(1,290,518)
-	-	-	(361.896)

A **FY Budget** summary box is located at the top of the budget entry dashboard.

- Automatically updates during budget entry process and reflects the total budget (all funds).
- The **FY Budget** summary box contains revenue that is historically provided by Budget & Planning Services.

	FY20				
	Unrestricted	Restricted	Auxiliary	Service Center	Total Funds
REVENUES					
Undergraduate Resident Tuition (Allocated)	4,365,404	-	-	-	4,365,404
Undergraduate Non-Resident Tuition (Allocated)	4,603,233	-	-	-	4,603,233
Graduate/Professional Tuition (Allocated)	1,355,500	-	-	-	1,355,500
Differential Tuition & Course Fees (Unit Inputs)	-	-	-	-	-
Distance Learning Fees (Unit Inputs)	-	-	-	-	-
Other Fees (Allocated)	427,626	-	-	-	427,626
5100 - Gross Tuition and Fees Subtotal	10,751,763	-	-	-	10,751,763
7300 - Student Aid (Allocated)	(1,290,518)	-	-	-	(1,290,518)
7320 - Waivers (Allocated)	(361.896)	-	-	-	(361.896)

Entering High Level Budget Data

- Go to **Revenue Budget Entry** section of dashboard.
- Enter budget data in the Input \$ column that are blue under the section for the appropriate budget pass.
- Explanations can be entered in the Comments column as needed.

Note: Any amounts entered will be formatted in blue. Data entry will only be permissible in the pass of the budget that has been deemed open for input. No saving required.

Revenue Budget Entry

School of Nursing Unrestricted

	FY14	FY15	FY16	FY17	FY18	FY19	FY20
	Actual	Actual	Actual	Actual	Actual	Adopted Budget	Budget Entry - First Pass
	Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	Budget \$	Input \$
							Comments
51055 - Distance Learning Fee (credit)	602,751	1,063,709	906,850	1,075,601	1,355,233	-	300
51060 - Professional Fees	752,600	757,280	767,944	810,847	870,720	-	-
5100 - Tuition & Fees	1,355,351	1,820,989	1,674,794	1,886,448	2,225,953	-	300
510 - Tuition & Fees & Waivers	1,355,351	1,820,989	1,674,794	1,886,448	2,225,953	-	300
54000 - Gift/Private Support Revenues	6,000	-	-	-	-	3,167,420	-
54010 - Gifts to AU from AUF	46,194	10,724	10,706	3,471	2,163	-	-
5400 - Gifts & Private Support Revenues	52,194	10,724	10,706	3,471	2,163	-	-
540 - Gifts & Private Support Revenues	52,194	10,724	10,706	3,471	2,163	-	-
56105 - Miscellaneous Sales Revenues	62,536	-	-	-	-	-	1,000
56106 - Conference/Workshop Revenues	-	-	4,050	3,000	4,200	-	-
56155 - Testing Diagnostic Fee Revenues	94,357	127,360	202,166	216,988	230,491	-	400
5600 - Sales & Services Revenues	156,894	127,360	206,216	219,988	234,691	-	1,400
560 - Sales & Services Revenues	156,894	127,360	206,216	219,988	234,691	-	1,400
57075 - Special Fees Revenues	54,210	-	-	26,550	-	58,980	300 Establishing new nu
57100 - Over/Short Income	-	-	-	-	1	-	-
5700 - Other Revenue	54,210	-	-	26,550	1	-	300
570 - Other Revenue	54,210	-	-	26,550	1	-	300
Accounts	1,618,648	1,959,073	1,891,716	2,136,457	2,462,809	4,086,611	2,000

- Go to **Expense Budget Entry** section of dashboard.
- Enter data in the same manner as the revenue section.
- Enter budget data in the Input \$ column that are blue under the section for the appropriate budget pass.
- Explanations can be entered in the Comments column as needed.

Expense Budget Entry

School of Nursing Unrestricted

	FY14	FY15	FY16	FY17	FY18	FY19	FY20
	Actual	Actual	Actual	Actual	Actual	Adopted Budget	Budget Entry - First Pass
	Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	Budget \$	Input \$
							Comments
7000 - Utilities	-	-	-	-	-	-	-
7005 - Communications	3,590	4,055	1,288	4,392	1,195	-	3,500
7010 - Rentals & Operating Leases	1,512	2,707	4,549	8,306	8,872	-	9,000
7015 - Repairs & Maintenance Services	1,775	407.4	1,701	945.3	2,995	-	2,000
7020 - Repairs & Maintenance Supplies	-	-	-	-	-	-	-
7025 - Travel-Individuals	79,963	83,353	105,248	118,930	117,906	-	120,000
7030 - Travel-Groups	37,436	1,700	2,140	26,199	12,486	-	18,000
7035 - Entertainment	4,564	7,636	8,037	8,857	10,007	-	10,000
7040 - Taxable Reimbursements	-	-	-	2,175	-	-	-
7045 - Competitive Awards	-	-	299.8	926.4	651.7	-	500
7050 - Reportable Service Expenses	5,659	7,603	4,137	4,637	29,374	-	15,000 Last year was a one
7055 - Temporary Employee Svcs	-	-	-	13,098	8,921	-	10,000
7060 - Game Expenses	-	-	-	-	-	-	-
7065 - Memberships & Dues	8,954	11,511	11,720	13,374	19,193	-	20,000
7070 - Advertising Costs	19,201	50,782	35,676	42,560	5,023	-	30,000
7075 - Subcontracts	-	-	-	-	-	-	-
7077 - Services-Internal Charges Only	37,456	49,131	63,520	63,036	82,185	-	80,000
7078 - Printing Costs	1,024	4,630	3,610	1,970	3,609	-	5,000

Detail Level Budget Entry

Go to the **Budget Entry – Revenues and Non Personnel Expenses** section of the Reporting & Navigation dashboard.

- Select **Detail Level** from the drop down box next to the pass at which data will be entered.

School of Nursing ▼

	Entry at High Level or Detailed?
Budget Entry - First Pass	High Level
Budget Entry - Second Pass	High Level
	Detailed

Click the **Go To** button for **Revenue Budget Entry – Detailed** or **Expense Budget Entry –Detailed**.

Budget Entry - Revenues and Non Personnel Expenses

Budget Entry Process

Step 1: For each pass, please select "High Level" or "Detailed" to the right. If no selection is made, the report below will default to "High Level".
*For Final Pass, data has to be entered in "Detailed" modules

Step 2: Please click the Budget Entry buttons below to make updates.
- For High Level, click "Go To: Budget Entry - High Level"
- For Detailed, click "Go To: Revenue Budget Entry - Detailed" and "Go To: Expense Budget Entry - Detailed"
- If you need to add a new Fund-Org combination for the Detailed Entry, click "Go to: New Fund-Org Request" and follow the steps on the dashboard

Step 3: View the budget below. For a detailed view of Revenue Allocations and Central Unit Allocations, please click "Go to: Budget Revenue Allocations" and "Go to: Central Unit Allocations"

School of Nursing ▼

	Entry at High Level or Detailed?
Budget Entry - First Pass	High Level
Budget Entry - Second Pass	High Level

Go To : Budget Entry - High Level

Go To : Revenue Budget Entry - Detailed

Go To : Expense Budget Entry - Detailed

Go to : New Fund-Org Request

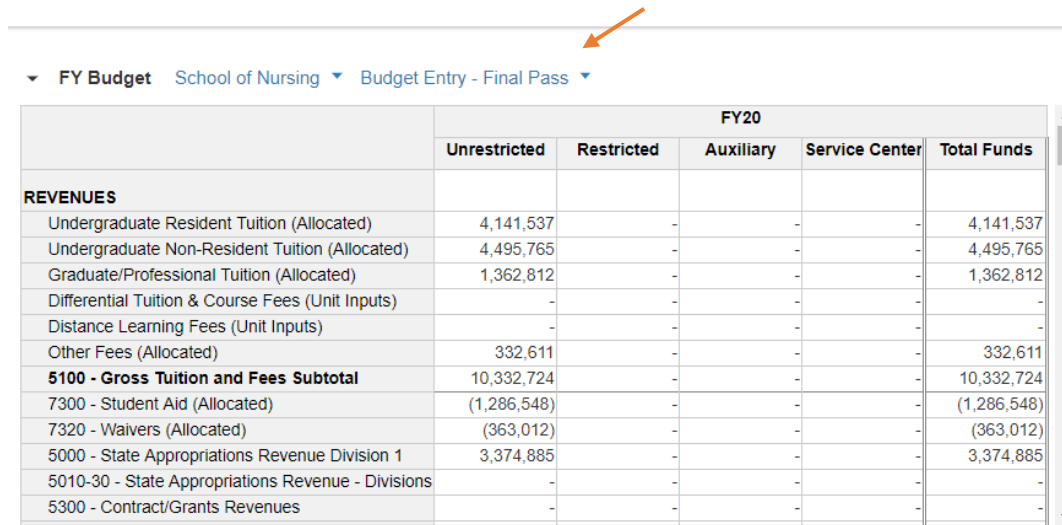
Go to : FY Full Budget

Go to : Budget Revenue Allocations

Go to : Central Unit Allocations

Go to : Budget Variance Reporting

Select the appropriate budget pass at the top of the dashboard.



The screenshot shows a dashboard interface. At the top, there is a navigation bar with a dropdown menu labeled 'FY Budget'. An orange arrow points to this dropdown menu. Below the navigation bar, there is a table with the following structure:

	FY20				
	Unrestricted	Restricted	Auxiliary	Service Center	Total Funds
REVENUES					
Undergraduate Resident Tuition (Allocated)	4,141,537	-	-	-	4,141,537
Undergraduate Non-Resident Tuition (Allocated)	4,495,765	-	-	-	4,495,765
Graduate/Professional Tuition (Allocated)	1,362,812	-	-	-	1,362,812
Differential Tuition & Course Fees (Unit Inputs)	-	-	-	-	-
Distance Learning Fees (Unit Inputs)	-	-	-	-	-
Other Fees (Allocated)	332,611	-	-	-	332,611
5100 - Gross Tuition and Fees Subtotal	10,332,724	-	-	-	10,332,724
7300 - Student Aid (Allocated)	(1,286,548)	-	-	-	(1,286,548)
7320 - Waivers (Allocated)	(363,012)	-	-	-	(363,012)
5000 - State Appropriations Revenue Division 1	3,374,885	-	-	-	3,374,885
5010-30 - State Appropriations Revenue - Divisions	-	-	-	-	-
5300 - Contract/Grants Revenues	-	-	-	-	-

Go to the **Revenue** or **Expense Budget Entry** section located below the summary box.

Select a **Fund-Org** combination in the left pane.

- Must select the fund org combination, NOT the department.
 - Can be searched or entered using the magnifying glass icon on the **Budget Entry Fund-Org Filter** or by clicking into the Fund-Org combination selector at top of module (formatted in blue).
- Enter revenue or expense in the CY Budget Input \$ column for each fund/org combination in the appropriate pass of the budget.
- Explanations can be entered in the Comments column as needed.

Note: Any amounts entered will be formatted in blue. Data entry will only be permissible in the pass of the budget that has been deemed open for input. No saving required.

Revenue Budget Entry

Budget Entry Fund-Org Filter 101001-148000

	FY14	FY15	FY16	FY17	FY18	FY19	FY20
	Actual	Actual	Actual	Actual	Actual	Actual	Budget Entry - Final Pass
	Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	Actual \$	Comments
101200-148001							
148001 - Nursing Constituency							
101001-148000							
260001-148000							
260002-148000							
148000 - Nursing Administration							
101001-148003							
148003 - School of Nursing Clinical Fees							
101002-148003							
182003 - Nursing Scholarships							
148000 - Nursing Administration							
101001-148500							
148500 - Nursing							
101002-148502							
148502 - Nursing Technology Tuition Fee							
101001-148506							
148506 - Nursing Salary Reserve							
101002-148516							
148516 - School of Nursing Distance Education							
148500 - Nursing							
School of Nursing							
50005 - State Approp-ALA Cancer Resch C							
50015 - Teacher In-Service Cnt State Rev							
5000 - AU State Appropriations Revenue							
50100 - AUM State Appropriations Rev							
5010 - AUM State Appropriations							
50200 - AAES State Appropriations Rev							
5020 - AAES State Appropriations							
50300 - ACES State Appropriations Rev							
5030 - ACES State Appropriations							
50400 - Other State Appropriations Rev							
5040 - Other State Appropriations							
500 - State Appropriations Revenue							
51015 - Special Services Fees							
51055 - Distance Learning Fee (credit)							
51050 - Professional Fees							
51070 - Honors College Fee							
5100 - Tuition & Fees							
510 - Tuition & Fees & Waivers							
52000 - Capital Appropriations							

New Fund-Org Requests

If a Fund/Org combination is missing in Anaplan, please use the following instructions to request it be created.

Click on the **Go To : New Fund-Org Request** button in the **Budget Entry – Revenues and Non Personnel Expenses** section under the Budget Workflow, Entry and Reporting area of the dashboard.

Budget Entry - Revenues and Non Personnel Expenses

Budget Entry Process

Step 1: For each pass, please select "High Level" or "Detailed" to the right. If no selection is made, the report below will default to "High Level".
*For Final Pass, data has to be entered in "Detailed" modules

Step 2: Please click the Budget Entry buttons below to make updates.
- For High Level, click "Go To: Budget Entry - High Level"
- For Detailed, click "Go To: Revenue Budget Entry - Detailed" and "Go To: Expense Budget Entry - Detailed"
- If you need to add a new Fund-Org combination for the Detailed Entry, click "Go to: New Fund-Org Request" and follow the steps on the dashboard

Step 3: View the budget below. For a detailed view of Revenue Allocations and Central Unit Allocations, please click "Go to: Budget Revenue Allocations" and "Go to: Central Unit Allocations"

College of Agriculture (Division 1)

	Entry at High Level or Detailed?
Budget Entry - First Pass	High Level
Budget Entry - Second Pass	

Go To : Budget Entry - High Level

Go To : Revenue Budget Entry - Detailed

Go To : Expense Budget Entry - Detailed

Go to : New Fund-Org Request

Go to : FY Full Budget

Go to : Budget Revenue Allocations

Go to : Central Unit Allocations

Go to : Budget Variance Reporting

Note: Instructions are located in the shaded boxes next to each action button.

Add Fund-Org Request Form

Step 1:

Use the dropdown to select an Org
If Org Status is A (Active) then proceed to Step 2
If Org is I (Inactive), select another Org

148001 - Nursing Constituency

Org Status

A

Step 2:

After confirming that the Org is Active, Select the Org from the Dropdown > Click "Create New Budget Fund-Org Request"

148001 - Nursing Constituency

Create New Budget Fund-Org Request

Step 3:

You will see a new row added with the Org populated.
Type the Fund Code in the "Enter Fund Code" column. If the code you entered is valid, it will show up in either the "Fund L4?" or "Fund L5?" column.

To delete a Fund-org request you created : Select the row, Click on the menu options of the module > Edit > Delete > OK.

New Budget Fund-Org Request Form

	Enter Fund Code	Fund L4?	Fund L5?	Org	Org Code
--	-----------------	----------	----------	-----	----------

Step 4:

Repeat the process for any additional Fund-Org combinations you need
Once complete, in the Send Email section, use the "Click Here" button to generate an email to inform the Budget Services team that you have a new request for approval.

Send Email [Click Here](#)

Use the table below to check if the Fund-Org you are looking for already exists

101200-148001
148001 - Nursing Constituency
101200-148001

- Using the drop down on the first entry box, select an Org.
 - If the Org Status is I (Inactive), please select a different org.
 - If the Org Status is A (Active), proceed to the next step.
- Upon confirming the org is active, select the Org from dropdown list next to Step 2.
- Click the **Create New Budget Fund-Org Request** button.
 - A new row will be added with the Org populated.
- Type the fund in the Enter Fund Code column.
 - If the code entered is valid, it will show in either the Fund L4? or Fund L5? column.
 - A row can also be deleted by selecting the row, go to Menu Options of module => Edit => Delete => OK.
- Repeat process for all additional Fund/Org combinations needed.
- Once complete, go to the **Send Email** section and **Click Here** to send a pre-populated email to Budget & Planning Services.

Note: If errors occur when utilizing the link to email Budget & Planning Services, it may be necessary to adjust the default mail options on your computer. Please reference the instructions on page 21 for further details.

Step 1:

Use the dropdown to select an Org
If Org Status is A (Active) then proceed to Step 2
If Org is I (Inactive), select another Org

Step 2:

After confirming that the Org is Active, Select the Org from the Dropdown >
Click > "Create New Budget Fund-Org Request"

Step 3:

You will see a new row added with the Org populated.
Type the Fund Code in the "Enter Fund Code" column. If the code you entered is valid, it will show up in either the "Fund L4?" or "Fund L5?" column.

To delete a Fund-org request you created : Select the row, Click on the menu options of the module > Edit > Delete > OK

Step 4:

Repeat the process for any addition Fund-Org combinations you need
Once complete, in the Send Email section, use the "Click Here" button to generate an email to inform the Budget Services team that you have a new request for approval.

An informational table is also available at the bottom of the dashboard to check if Fund/Org exists.

- Revised as of 04/09/19

Additional Reporting

Budget Entry - Revenues and Non Personnel Expenses

Budget Entry Process

Step 1: For each pass, please select "High Level" or "Detailed" to the right. If no selection is made, the report below will default to "High Level".
*For Final Pass, data has to be entered in "Detailed" modules

Step 2: Please click the Budget Entry buttons below to make updates.
- For High Level, click "Go To: Budget Entry - High Level"
- For Detailed, click "Go To: Revenue Budget Entry - Detailed" and "Go To: Expense Budget Entry - Detailed"
- If you need to add a new Fund-Org combination for the Detailed Entry, click "Go to: New Fund-Org Request" and follow the steps on the dashboard

Step 3: View the budget below. For a detailed view of Revenue Allocations and Central Unit Allocations, please click "Go to: Budget Revenue Allocations" and "Go to: Central Unit Allocations"

▼ College of Agriculture (Division 1) ▼

	Entry at High Level or Detailed?
Budget Entry - First Pass	High Level
Budget Entry - Second Pass	Detailed

Go To : Budget Entry - High Level

Go To : Revenue Budget Entry - Detailed

Go To : Expense Budget Entry - Detailed

Go to : New Fund-Org Request

Go to : FY Full Budget

Go to : Budget Revenue Allocations

Go to : Central Unit Allocations

Go to : Budget Variance Reporting

Go to : FY Budget Report - Dept. View

Go to : FY Budget Report - Detailed View

Go to : FY Full Budget

- Displays the current budget entry at income statement level detail by fund type and budget version.
- Contains helpful red conditional formatting on *Margin After Mission Enhancement Fund* line item to identify out of balance budgets.

Go to : Budget Revenue Allocations

- Outlines metrics used in determining allocations for budget revenue by budget by budget version.

Go to : Central Unit Allocations

- Lists variables and drivers used in calculating central unit allocations by budget version.

Go to : Budget Variance Reporting

- Variance reporting designed to illustrate variances between each pass of the budget process.

Go to : FY Budget Report - Dept. View

- Displays the budget at income statement level detail by budget version, five digit department, and time dimensions.

Go to : FY Budget Report - Detailed View

- Displays the current budget at income statement level detail by budget version, fund/org combinations, and time dimensions.

Note: All graphs are customizable by changing the dimension selections found on each report.

Positional Budgeting

On the **Budget Workflow, Entry and Reporting** section of the dashboard under **Personnel Budgeting**, select **Go to: Positional Budgeting**.

Note: Instructions are located in the shaded boxes next to each action button.

The screenshot displays the 'Budget Development Model' interface. At the top, there's a navigation bar with 'Revenue Units - Reporting & Navigation' and a user profile 'naplan'. Below this is a table with columns: 'Status (Select from Dropdown)', 'Approvers', 'Feedback', and 'Feedback'. A row for 'School of Nursing' is shown with a status of 'In Progress' and an email 'budroff@auburn.edu'. Below the table, there's a section titled 'Budget Entry - Revenues and Non Personnel Expenses'. This section contains a 'Budget Entry Process' box with instructions and a 'School of Nursing' dropdown menu. Below these are two rows of buttons: 'Go To: Budget Entry - High Level', 'Go To: Revenue Budget Entry - Detailed', 'Go To: Expense Budget Entry - Detailed', 'Go To: New Fund-Orig Request', 'Go To: FY Full Budget', 'Go To: Budget Revenue Allocations', 'Go To: Central Unit Allocations', and 'Go To: Budget Variance Reporting'. At the bottom, under 'Personnel Budgeting', there's a text box with instructions and a 'Go to: Positional Budgeting' button, which is highlighted by an orange arrow.

Select the **Budget Entry-Pass** located below the school name.

Note: The position file will be loaded at the beginning of budget development. Budget & Planning Services will update the file for new positions periodically during the budget process. Any updates will not overwrite any changes that have been entered by an end user. If there is a new position not shown in the list, budget the position on a vacant position until the position is updated in Anaplan.

** Any changes to positions will be saved automatically.*

Budget Development Model /f.naplan

Revenue Units - Reporting & Navigation > Position Budgeting

Master Reset Save As My View Save As Master Refresh Copy Export

Positional Budget Entry

Positions by Bud Org

Salary Enhancement Totals

Mass Apply %

School of Nursing Budget Entry - First Pass

School of Nursing Budget Entry - First Pass

Salary Enhancement Pool	110,423
Salary Enhancement Allocated	100,765
Difference	9,658

Budget % Increase	3%
-------------------	----

There are several ways to change the budget on a position.

- Use the **Budget % Increase** section (green arrow) to apply a standard increase to all single incumbent filled positions.
 - The percentage will not be systematically applied to multi-filled, vacant positions, or to positions that you share funding with another area that are not housed under your unit's Bud Org.
 - The mass applied increase will show in the Mass Apply Budget % Increase column (purple arrow). You will not be able to enter a Manual Budget Increase for positions that have the Mass % applied.
- If the mass percentage should not be applied to a particular position, check the **Mass Applied % Override** box for that position (blue arrow). This will remove the mass applied percentage and you will be able to enter an amount in the Manual Budget Increase column. (orange arrow).
- Any anticipated job family, faculty promotion or position adjustment increases should be entered in the Other Adjustment column highlighted in blue. (red arrow)

Revenue Units - Reporting & Navigation * x Position Budgeting * x

Master Reset Save As My View Save As Master Refresh Copy Export Edit

School of Nursing Budget Entry - First Pass

Salary Enhancement Cap 150,000
 Salary Enhancement Awarded 114,883
 Difference 35,117

Budget % Increase 3.8%

The table below shows all positions that roll up to the College listed to the left of these directions. To update Proposed Positional Budgets, please follow the steps below.
 Step 1: To apply a standard % increase across all positions, enter the % in the "Budget % Increase" line above.
 Step 2: For any positions exempt from the standard % increase, click the "Mass Applied % Override" column below.
 Step 3: To apply a unique change for a position, enter the \$ value in the "Change Amount" column.

Budget Entry - First Pass FY20

Name	Bud Org	Base Budget	Change %	Mass Applied % Override	Mass Apply Budget % Increase	Manual Budget Increase	Other Adjustments	Proposed Budget	Labor Dist.	Comments
148000 - Nursing Administration	-	0.0%			-	-	-	100%		
148000 - Nursing Administration	-	0.0%			-	-	-	100%		
Multi-filled	148000 - Nursing Administration	-	0.0%		-	-	-	100%		
Multi-filled	148000 - Nursing Administration	-	0.0%		-	-	-	100%		
Multi-filled	148000 - Nursing Administration	-	0.0%		-	-	-	100%		
Multi-filled	148000 - Nursing Administration	-	0.0%		-	-	-	100%		
Harris, Laurie C.	148000 - Nursing Administration	38,200	3.8%		1,452	-	1,500	41,152 100%		
Ward, Tara M.	148000 - Nursing Administration	60,000	3.8%		2,280	-	-	62,280 100%		
Hennessey, Pamela P.	148000 - Nursing Administration	76,280	3.8%		2,899	-	-	79,179 100%		
Watkins, Linda M.	148000 - Nursing Administration	75,330	3.8%		2,863	-	(10,000)	68,193 100%		
Dabbs, Karen F.	148000 - Nursing Administration	44,630	3.8%		1,696	-	-	46,326 100%		
Long, Brandi M.	148000 - Nursing Administration	45,920	3.8%		1,745	-	-	47,665 100%		
Harrelson, Nancy N.	148000 - Nursing Administration	33,770	3.8%		1,283	-	(1,500)	33,553 100%		
Hunt, Caralise W.	148000 - Nursing Administration	134,880	0.2%		-	300	-	135,180 100%		
Jones, Cassandra D.	148000 - Nursing Administration	38,500	0.8%		-	300	-	38,800 100%		
White, Kathleen K.	148000 - Nursing Administration	42,000	59.5%		-	25,000	-	67,000 100%		
Neuschwander, Gregg E.	148000 - Nursing Administration	239,940	3.8%		9,118	-	-	249,058 100%		
Richardson, Allison E.	148001 - Nursing Constituency	48,290	3.8%		1,835	-	-	50,125 100%		
Grier, Shelley W.	148001 - Nursing Constituency	92,960	3.8%		3,532	-	-	96,492 100%		
Carroll, Hopewell P.	148500 - Nursing	57,610	3.8%		2,189	-	-	59,799 100%		

Note: The Mass Applied % Increase and Manual Budget Increase columns will feed the Salary Enhancement Awarded summary box at the top of the dashboard. If the total is greater than the Salary Enhancement Cap, the difference will be highlighted in red. You will need to adjust the merit so that it is equal to or less than the cap. Cap amounts will be entered by Budget & Planning Services.

- If a position is shown on the list, but the Bud Org does not belong to your unit, **DO NOT** adjust the budget on the position. The mass apply % will not calculate on this position for your unit and will not be included in the salary enhancement totals. It is there to let you know a portion of the salary will be charged to your unit.
- You can adjust your unit's portion of the position distribution. You will need to work with the unit owner of the position to ensure the position distribution is correct.

College Totals

Below the Budget Position Entry screen will be a College Totals section. This shows a running total of the adjustments made to positions.

Note: These totals will not include any positions that are not in a Bud Org owned by your unit even though they will show in the Budget Position Entry Screen.


College Totals						
▼ School of Nursing ▼ Budget Entry - First Pass ▼ FY20 ▼						
		Base Budget	--	Mass Apply Budget % Increase	Manual Budget Increase	Other Adjustments Proposed Budget
		5,031,551		140,463	5,600	(10,000) 5,167,634

Export to Excel

Note: The data table may be exported into Excel for personal use, but may not be imported back into Anaplan. Formulas will not be downloaded to the Excel file. Changes, however, can be copied and pasted from Excel into Anaplan.

- Go to the **Position Distribution by FOAP** section.
- Click on the **Position Dist. – Export to Excel** button.

Position Distribution by FOAP

 **Position Dist. - Export to Excel**

The Position Dist - Export to Excel button will enable a download of positions and their associated labor distributions.

To Adjust Position Distribution by FOAP

- Click on the position. The current distribution will appear below in the **Position Distribution by FOAP** section.
- Key any necessary percentage adjustments in the Labor Distribution % Adjustment column (blue arrow).

Note: If the labor distribution percentages do not add up to 100%, the total will be highlighted in red (red arrows). When the percentages are corrected and total 100%, the red highlighted items will turn to green.

Positions by Bud Org

School of Nursing Budget Entry - First Pass

Budget % Increase 3%

The table below shows all positions that roll up to the College listed to the left of these directions. To update Proposed Positional Budgets, please follow the steps below.

Step 1: To apply a standard % increase across all positions, enter the % in the "Budget % Increase" to the left.
 Step 2: For any positions exempt from the standard % increase, click the "Mass Applied % Override" column below.
 Step 3: To apply a unique change for a position, enter the \$ value in the "Change Amount" column.

Budget Entry - First Pass FY20

Name	Bud Org	Base Budget	Change %	Mass Applied % Override	Change Amount	Proposed Budget	Labor Dist.
139200 - Professor/Dir Graduate Program	148500 - Nursing	133,450	3.0%		-	137,454	Under 100%
139250 - Clinical Associate	148500 - Nursing	365,000	0.0%		-	365,000	Under 100%
OC1485 - OCC Nursing	148500 - Nursing	-	0.0%		-	-	Under 100%
OL2610 - Nursing OL	148500 - Nursing	-	0.0%		-	-	Under 100%
149790 - Admin Support Spec II-Acad	148500 - Nursing	46,210	3.0%		-	47,596	Under 100%
139130 - Assistant Clinical Professor	148500 - Nursing	90,880	3.0%		-	93,606	Under 100%
701600 - Instructor	148500 - Nursing	-	0.0%		-	-	Under 100%
169940 - Assistant Clinical Professor	148500 - Nursing	85,000	3.0%		-	87,550	Under 100%
139120 - Assistant Clinical Professor	148500 - Nursing	90,330	3.0%		-	93,040	Under 100%
139230 - Assistant Clinical Professor	148500 - Nursing	81,190	3.0%		-	83,626	Under 100%
139410 - Assistant Clinical Professor	148500 - Nursing	80,690	3.0%		-	83,111	Under 100%
139093 - Instructor	148500 - Nursing	80,000	3.0%		-	82,400	Under 100%
139370 - Assistant Clinical Professor	148500 - Nursing	86,160	3.0%		-	88,745	Under 100%
139390 - Assistant Clinical Professor	148500 - Nursing	87,520	3.0%		-	90,146	Under 100%
139390 - Assistant Clinical Professor	148500 - Nursing	86,160	3.0%		-	88,745	Under 100%
139260 - Assistant Clinical Professor	148500 - Nursing	83,020	3.0%		-	85,511	Under 100%
139400 - Assistant Clinical Professor	148500 - Nursing	83,650	3.0%		-	86,160	Under 100%
139300 - Associate Clinical Professor	148500 - Nursing	99,800	3.0%		-	102,794	Under 100%
139310 - Assistant Clinical Professor	148500 - Nursing	84,120	3.0%		-	86,644	Under 100%
139260 - Associate Clinical Professor	148500 - Nursing	97,810	3.0%		-	100,744	Under 100%
139091 - Advisor II - Academic	148500 - Nursing	48,970	3.0%		-	50,439	Under 100%

Position Distribution by FOAP

Budget Entry - First Pass FY20

Fund	Organization	Account	Program	Percent	Labor Distribution % Adjustment	New Percent	Base Budget Amount	Updated Budget Amount	Proposed Budget Amount
139200 - Professor/Dir Graduate Program	101001	148500	60115	3010	10.0%	0.0%	13,345	13,745	-
139200 - Professor/Dir Graduate Program	101001	148500	60115	1020	40.0%	0.0%	53,380	54,981	-
139200 - Professor/Dir Graduate Program	101001	148500	60115	4000	50.0%	0.0%	66,725	68,727	-
139200 - Professor/Dir Graduate Program					100.0%	0.0%	133,450	137,454	-

To Add a New FOAP to the Position Distribution

- Go to the **Add New FOAP** section of the dashboard.
- Select a position from the list on the left.
- Click **Add New FOAP** button.
- In the table below the **Add New FOAP** button, enter the new FOAP details on the newly created line. Select applicable fund, organization, account, and program number.
- After entering FOAP details, click **Update FOAP List** button.
- Click **Run** in the pop up window and close results page.
- Return to **Position Distribution by FOAP** section to view the new FOAP and adjust the distribution percent.

Add New FOAP

▼

156310 - ESL Instructor II
156470 - Admin Support Spec II-Admin
160160 - Development Officer I
142520 - Uniform Custodian II
142760 - Admstr II, Academic Programs
142780 - Director Ctr Teach & Learn
142790 - Asst Prov Spec Project & Int
142830 - Coord. Bus/Admin Svcs I
142860 - Associate Director Biggio Ctr
142880 - Learn Spaces/Faculty Dev Coord
142900 - Asst Provost, Intl Programs
142910 - Assistant Director
142940 - Admin Support Asst I-Admin
142950 - Dir, Budget Budget Svc

▲

To create a new FOAP, follow the steps below.

Step 1: Select the Position on the list to the left.
Step 2: Click "Add New FOAP"
Step 3: In the table below the "Add New FOAP" button, enter the new FOAP details on the newly created line. Please select the applicable Fund, Organization, Account, and Program number.
Step 4: After entering the FOAP details, click "Update FOAP List." In the popup window, click "Run", and then close the results page.
Step 5: Return to "Position Distribution by FOAP" section. The new FOAP will now appear, and you can now adjust the distribution %.

*NOTE - If the FOAP highlights red in the table below, then the Fund entered does not currently exist in the system. Please double-check the Fund entry.

Add New FOAP
Update FOAP List

▼

Position	Fund	Organization	Account	Program
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*Note: If the FOAP is invalid it will highlight in red. Double check to make sure the FOAP was entered correctly. If this is a new FOAP, go to the **New Fund-Org Request** button located in the **Budget Workflow, Entry and Reporting** section in Anaplan. Please allow 24 hours for the update to take effect.*

** If Bud Org changes are required for a position, please contact Budget & Planning Services to initiate the change.*

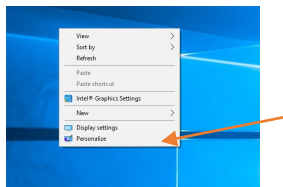
Submitting Budget for Approval

Upon completion of budget entry, return to the Reporting and Navigation dashboard to the **Budget Workflow, Entry and Reporting** section.

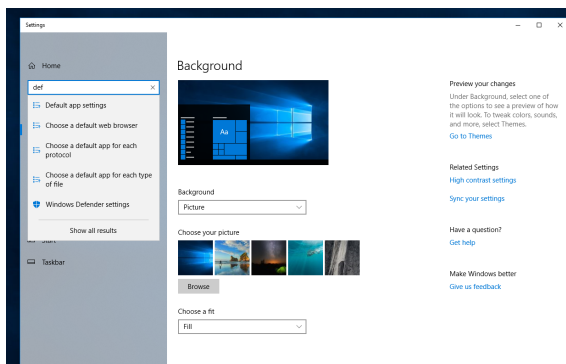
- Change the Submission Status column to **Complete**.
- Add any comments for the next approver in the Budget Owner – Enter Comments field.
- Use the Click Here link under the Send Email to Approvers to generate an email to notify completion.
- Click **Send**.

Budget Workflow - Budget Owners											Budget Entry - First Pass	
	Budget Owner	Submission Status (Select from Dropdown)	Budget Owner - Enter Comments	Send Email to Approvers	Provost Approver	Provost Feedback	Provost Feedback - Comments	Budget Services Approver	Budget Services Feedback			
School of Nursing	jan0013@auburn.edu	Completed	First Pass Complete	Click Here	haylej@auburn.edu	Approved	Look okay to me?	budnoff@auburn.edu	Approved			
		In Progress										
Budget Entry - Revenues and Non Personnel Expenses		Completed										

If the email does not open, it may be necessary to adjust the default mail options for your computer.
Right click on the desktop and select **Personalize**.



In the search box, type “**Default**” and a list should pop up. Select Default App Settings.



Under Email select Outlook 2016 for the list that pops up.

Salary Recommendation Process

Click the **Go to: Salary Increases** button located in the **Salary Recommendations** section of the dashboard.

A summary of the merit caps and awards is located to the right of the instruction box.

Note: Instructions are located in the shaded boxes next to each action button.

Salary Recommendations

To make Merit Increases, One-Time Increases, and other Salary Recommendations, please click "Go to" Salary Increases"

The chart to the right shows current amounts awarded vs. the merit caps in place.

▼ FY20

	Merit Cap	One-Time Supplement Cap	Merit Awarded	One-Time Supplement Awarded	Merit Over Cap	Merit Amount Over Cap	One-Time Over Cap	One-Time Amount Over Cap
School of Nursing	150,000	150,000	3,500	500		-		-

Go to: Salary Increases

Salary Recommendations Workflow & Approvals

The **Salary Recommendations Workflow & Approvals** section is the starting point for the Salary Recommendation Process. This section provides visibility to where the budget owner is in the salary merit process and insight into approval status.

Salary Recommendations Workflow & Approvals

When you start making updates to your Unit, please change the Submission Status to "In Progress"
Once complete, please update the status to "Complete" and send an email to the Approvers using the "Click Here" option below.

▼ Salary Recommendation Workflow - Budget Owners

	Budget Owner	Submission Status (Select from Dropdown)	Budget Owner - Enter Comments	Send Email to Approvers	Provost Approver	Provost Feedback	Provost Feedback - Comments	HR Approver	HR Feedback	HR - Comments
School of Nursing				Click Here						

- In the **Submission Status (Select from Dropdown)** column, click on the dropdown and select **In Progress**. (The box will be highlighted in yellow one you select **In Progress**).

- Once the merit recommendations are complete, return to this section and change the Submission Status to **Complete**. (The box will be highlighted in green once complete is selected).
- Upon completion, use the Click Here option under the **Send Email to Approvers** to submit to the next level approver.
- An email will open pre-populated with the next approver. Attach any merit justification forms required by Human Resources to the email before submission.

Salary Increase Recommendation

This section presents the totals of the Merit and One-Time caps. Totals will calculate in both the merit and one time tables upon entering amounts for each employee. The difference line will be highlighted in red if the caps are exceeded.

Salary Increase Recommendation

Please select the appropriate College from the list under "Merit Totals" below. The tables below track the total merit and one-time supplement spend vs. the approved cap.

Merit Totals

▼ School of Nursing ▼ FY20

Merit Cap	150,000
Merit Awarded	50,000
Merit Difference	100,000

One-Time Totals

▼ School of Nursing ▼ FY20

One-Time Supplement Cap	150,000
One-Time Supplement Awarded	50,000
One-Time Supplement Difference	100,000

Adding Merit and One-Time Amounts to Individual Employees

- Only individuals eligible for a merit or one-time supplement will be shown.
- Columns highlighted in orange will be populated with the employee name and ID number.
- Enter data and comments in blue highlighted cells.
- Approved job family promotions, faculty promotions, faculty market equity and post 5/31 adjustments will be loaded by Budget & Planning Services. If additional Faculty Market/Equity Adjustments or Post 5/31 Adjustments are needed, there are columns highlighted in blue for any additional adjustments. Contact Budget & Planning Services if a change is needed to a job family or faculty promotion.
- Enter the merit amount for both merit and one-time instead of the percentage. Total salary must round to the nearest \$10. If it does not round to the nearest \$10, the cell will be highlighted in pink.
- Merit Increase % and One-Time % columns will highlight in pink if percentage is 0% or greater than 6%. These employees will require a merit justification form be submitted with the Salary Recommendation worksheet.

- Merits and one time amounts can be entered individually or you can use Excel to upload the information.
- The section below the merit entry screen will keep a running total of the proposed total merit and one time and salary amounts for the unit as a whole (red arrow).

Note: Merits for Development employees assigned to a unit will be entered by the office of The Vice President for Development. The Development employees will show under the units they are assigned, but will not be enterable by the unit. The merits entered by Development will adjust the unit's cap.

Export to Excel

Salary Rec - Import from Excel

FY20

	ID	First Name	Last Name	Supervisor	Base Salary	Merit Increase %	Merit Increase Amount	Faculty Market/Equity Adjustment	Post 5/31 Adjustment	Job Family Promotion	Faculty Promotion	Faculty Market/Equity Adj. Total	Post 5/31 Promotion Total	Proposed Salary w/ Merit Increase	One-Time Amount	One-Time %	Comments	
		Hunt, Caralise W.			37,000	0.00%	-	-	-	-	-	-	-	37,000	-	0.00%		
		Neuschwander, Gregg E.			60,000	0.00%	-	-	-	-	-	-	-	60,000	-	0.00%		
		Watkins, Linda M.			72,820	0.00%	-	-	-	-	-	-	-	72,820	-	0.00%		
		Neuschwander, Gregg E.			71,920	2.78%	2,000	-	1,000	1,000	2,000	3,000	(5,000)	75,920	-	0.00%		
		Watkins, Linda M.			43,020	0.00%	-	2,000	-	-	1,000	2,000	3,000	5,000	56,020	-	0.00%	
		Neuschwander, Gregg E.			41,840	0.00%	-	-	-	-	-	-	-	41,840	-	0.00%		
		Watkins, Linda M.			30,770	0.00%	-	-	-	-	-	-	-	30,770	-	0.00%		
		Neuschwander, Gregg E.			130,000	0.00%	-	-	-	-	-	-	-	130,000	-	0.00%		
		Hunt, Caralise W.			38,500	0.00%	-	-	-	-	-	-	-	38,500	-	0.00%		
		Hardgrave, Billy C.			226,360	0.00%	-	-	-	-	-	-	-	226,360	-	0.00%		
		Grunder, Shelley W.			47,000	2.13%	1,000	-	-	-	-	-	-	48,000	-	0.00%		
		Jones, Tara G.			89,820	0.00%	-	-	-	-	-	-	-	89,820	-	0.00%		
		Hunt, Caralise W.			55,000	0.00%	-	-	-	-	-	-	-	55,000	-	0.00%		
		Neuschwander, Gregg E.			125,740	0.00%	-	-	-	-	-	-	-	125,740	-	0.00%		
		Watkins, Linda M.			44,540	0.00%	-	-	-	-	-	-	-	44,540	-	0.00%		
		Hunt, Caralise W.			82,620	0.00%	-	-	-	-	-	-	-	82,620	-	0.00%		
		Hunt, Caralise W.			85,000	0.00%	-	-	-	-	-	-	-	85,000	-	0.00%		
		Hunt, Caralise W.			82,680	0.00%	-	-	-	-	-	-	-	82,680	-	0.00%		
		Hunt, Caralise W.			75,490	0.00%	-	-	-	-	-	-	-	75,490	-	0.00%		
	Totals by College																	

FY20 School of Nursing

	Base Salary	Merit Increase Amount	Job Family Promotion	Faculty Promotion	Faculty Market/Equity Adjustment	Post 5/31 Adjustment	Proposed Salary w/ Merit Increase
	3,616,340	3,000	2,000	4,000	8,000	1,000	3,633,340

Exporting and Importing using Excel

- Select the **Export to Excel** button located above the employee listing (blue arrow above) and click on **Run** to complete the download.
- The formulas and formatting will not be downloaded in Excel. **DO NOT** insert or delete any columns.
- Re-enter formulas to calculate percentages and totals.

- Note: Data can be copied and pasted directly from Excel into Anaplan instead of using the re-import feature.*

Note: If the percentages do not add up to 100%, the total will be highlighted in red. When the percentages are corrected and total 100%, the total will no longer be highlighted in red.

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Labor Distribution Percent Master List

This section of the dashboard is a list of employees and their labor distributions. Changes made in the fields above will be reflected on this screen. Changes can also be made directly in this section and will populate the merit and one-time sections above. This data can also be exported by selecting the **Labor Dist Master List - Export to Excel**, however the data cannot be re-imported into Anaplan.

Note: The Labor Distribution Percent Master List includes all of a unit's employees, regardless of whether the employee is eligible for a merit or one time. This enables an end user to make adjustments to labor distributions for any employee, despite eligibility status.

Labor Distribution Percent Master List

Labor Dist Master List- Export to Excel

▼ FY20

	Bois Org	Fund	Organization	Account	Program	Labor Dist. Percent	New Labor Dist. Percent (Merit) as of 10/1	Base Salary	Proposed Salary	Merit Variance	New Labor Dist. Percent (One-Time)	Original	Current	Variance
	148500 - Nursing	101002	148003	60115	1020	80.00%	80.00%	72,472	72,472	-	0.00%	72,472	-	(72,472)
	148500 - Nursing	101002	148003	60115	2050	10.00%	10.00%	9,059	9,059	-	0.00%	9,059	-	(9,059)
	148500 - Nursing	101002	148003	60115	3010	10.00%	10.00%	9,059	9,059	-	0.00%	9,059	-	(9,059)
						100.00%	100.00%	90,590	90,590	-	0.00%	90,590	-	(90,590)
	148000 - Nursing Administration	101001	148000	60200	4000	100.00%	100.00%	60,000	60,000	-	0.00%	60,000	-	(60,000)
						100.00%	100.00%	60,000	60,000	-	0.00%	60,000	-	(60,000)
	148500 - Nursing	101001	148500	60200	6000	100.00%	100.00%	46,750	46,750	-	0.00%	46,750	-	(46,750)
						100.00%	100.00%	46,750	46,750	-	0.00%	46,750	-	(46,750)
	148000 - Nursing Administration	101001	148000	60200	6000	100.00%	100.00%	72,820	122,820	50,000	0.00%	122,820	-	(122,820)
						100.00%	100.00%	72,820	122,820	50,000	0.00%	122,820	-	(122,820)
	148000 - Nursing Administration	101001	148000	60200	4000	100.00%	100.00%	71,920	71,920	-	0.00%	71,920	-	(71,920)
						100.00%	100.00%	71,920	71,920	-	0.00%	71,920	-	(71,920)
	148000 - Nursing Administration	101001	148000	61005	4000	100.00%	100.00%	43,020	43,020	-	0.00%	43,020	-	(43,020)
						100.00%	100.00%	43,020	43,020	-	0.00%	43,020	-	(43,020)
	148000 - Nursing Administration	101001	148000	61005	4000	100.00%	100.00%	41,840	41,840	-	0.00%	41,840	-	(41,840)
						100.00%	100.00%	41,840	41,840	-	0.00%	41,840	-	(41,840)
	148000 - Nursing Administration	101001	148000	61005	6000	100.00%	100.00%	30,770	30,770	-	0.00%	30,770	-	(30,770)
						100.00%	100.00%	30,770	30,770	-	0.00%	30,770	-	(30,770)
	148000 - Nursing Administration	101001	148000	60005	4000	50.00%	50.00%	65,000	65,000	-	0.00%	65,000	-	(65,000)
	148000 - Nursing Administration	101001	148000	60005	1020	50.00%	50.00%	65,000	65,000	-	0.00%	65,000	-	(65,000)

Add New FOAPs

Note: There are specific directions in the blue shaded box on the dashboard.

To Add a New FOAP to the Position Distribution:

- Click **Add Employee FOAP**.
- Enter **Employee Name**: Last Name, First name; Status will change to In-Progress.
- Enter **FOAP information** - Status will change to Complete.
- Click **Update Employee FOAPs**.
- Click **Run** on the pop-up box.

Add New FOAPs

To create a new FOAP for either the Merit or One-Time Distribution above, please follow the steps below.

Step 1: Click "Add Employee FOAP"

Step 2: In the table below, fill out the Employee Name (Format: Last Name, First Name), Fund, Organization, Account, and Program in the newly created line

Step 3: Click "Update Employee FOAPs". The new FOAP combination you created in Step 2 will now appear in the distributions above.

*NOTE - If a new line does not populate in the table after clicking "Add Employee FOAP", please refresh the dashboard.

Add Employee FOAP	
Update Employee FOAPs	

	Status	Employee Name	Fund	Organization	Account	Program	Activity Code
-	New						
-	New						

- The Process Completed screen below will open.
 - a. Ignore the first line with the yellow triangle.
 - b. The green check mark means the FOAP was loaded. Close the box to complete update.
- The Position Distribution by FOAP should update in the labor distribution sections above.

Process Completed



Process complete but with failures. Click below for details.

Result Summary Details

> Expand all items

> Salary Rec by FOAP from Budget Development Model / Merit I-1

✓ Clear New Emp FOAPs

1 items were deleted from the list Salary Rec - New FOAPs using Merit Increase - New FOAP Management Delete?

New Employee Requests

Note: There are specific directions in the shaded box on the dashboard.

To Add a New Employee

- Click on the **New Employee Request** to initiate program.
- Enter **Position number** by directly typing the position or by double clicking the dropdown arrow to bring up a list of positions.
- Enter **Employee ID** number.
- Enter **Employee Name**.
- Enter **Supervisor Name**.
- Enter **Base Pay**.
- The request will route to Budget & Planning Services and once approved, the employee will be updated in the Merit Recommendation Section and will be removed for the New Employee Request List.
- If there is an issue adding the employee, there will be comments from Budget & Planning Services in the New Employee Request section.

New Employee Requests

To request a new employee, click "New Employee Request" and select the employee's position number on the next screen. Then, fill out the Position, ID, Name, Supervisor, and Base Pay.

Budget Services will review each new request and approve. Once approved, the employee will be removed from the list below and added to the table above. If any changes are needed before approval, the "Comments" field will contain the instructions.

New Employee Request

Position	ID	Name	Supervisor	Base Pay	Approved?	Comments
141320 - Mgr. Comm & Marketing				1	<input checked="" type="checkbox"/>	
				0	<input type="checkbox"/>	
				0	<input type="checkbox"/>	
				0	<input type="checkbox"/>	

Submitting Salary Recommendations for Review

- Return to the **Salary Recommendations Workflow & Approvals**.
- Change the **Submission Status** to **Complete** (box will turn to green). You cannot make any changes when status is complete. If changes are needed, change status back to **In Progress** and make needed adjustments.
- Under **Send Email to Approvers**, select the **Click Here** option to open an email.
- Email will be pre-populated with the next approver.
- Attach all merit justification forms needed in PDF format. You can also add additional comments to the email.
- If Salary Recommendations are approved, they will be routed to Human Resources for final approval.
- If Salary Recommendations are not approved, an email will be returned listing any changes that are needed.
 - Set Submission Status back to **In Progress** and make changes. Change Submission Status back to **Complete** and resubmit.

