

BUDGET

AND

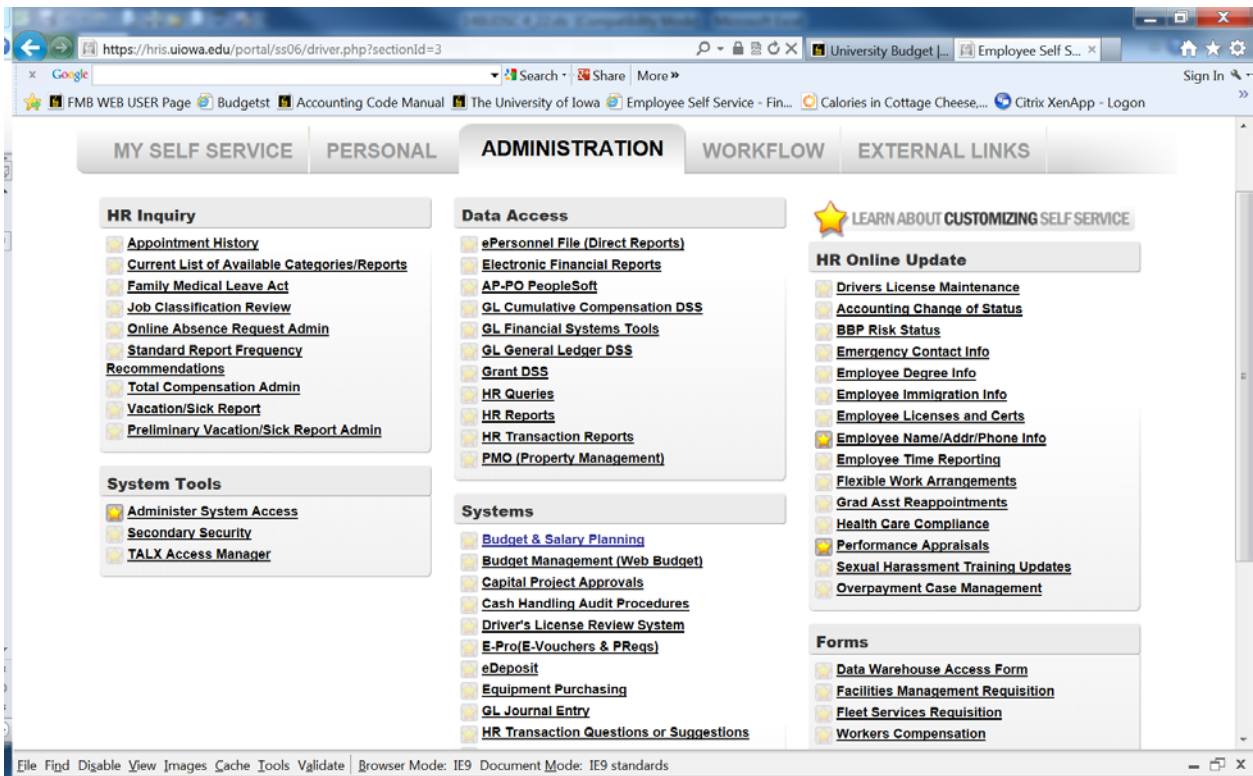
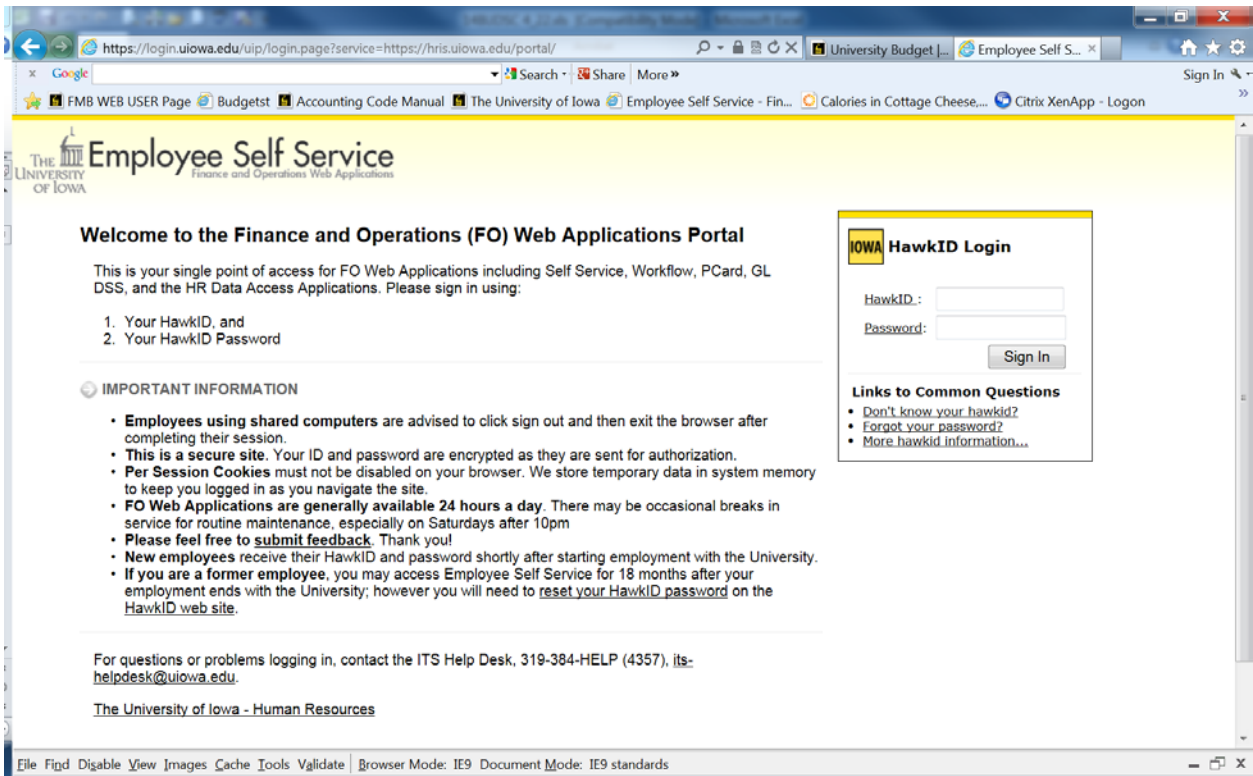
SALARY PLANNING

APPLICATION

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LOGIN / ACCESS RIGHTS



You will access the Budget & Salary Planning Application through the Finance and Operations (FO) Web Applications Portal Self Service. You will use your Hawk ID and password to log into this system. If you do not know your Hawk ID, you will need to contact the ITS help desk at 335-6363.

Your Budget Officer should request access to the budget application. The degree of access can be controlled to the departmental level.

The individual is now considered an active user. At any time a Budget Officer may request an individual be changed to inactive status. A Budget Officer may also request a change in access level or that an individual be removed altogether.

Once in the application, a user will only be able to change records within the org and department(s) to which he/she has access.

MAIN SWITCHBOARD

The screenshot shows a web browser window displaying the 'Budget & Salary Planning' application. The page header includes the University of Iowa logo and the text 'Budget Year: FY - 2014'. The main content area is titled 'Hello Cathy Hagen' and features a navigation menu on the left with categories: 'Salary Planning' (Filled Positions, Unfilled Positions, General Expense & Revenue, Working Budget), 'Miscellaneous' (Filters, Reports, Export data, Balance), and 'Budget Office Only' (User Management, Special Control Sheet Report, Validate GL MFKs, Final GL Export, Final Budget Book Export, Import Records). There are also links for 'Change Password' and 'Logout'. On the right side, there is a 'Filter' dropdown set to 'Adhoc Filter', a 'Change' button, and a section for 'Budget News & Messages' with links to '2012-2013 Salary Guidelines', 'FY 13 Human Resource Guidelines', and 'Budget App Documentation'. A 'Budget Year' dropdown is set to 'FY - 2014' with a 'Set Year' button. At the bottom, there is a list of org/depts and contact information for technical support.

SALARY PLANNING

This Salary Planning button takes you to the forms that allow you to update budget and salary information by:

- A. Filled Positions
- B. Unfilled Positions
- C. General Expense/Revenue
- D. Working Budget

These will be discussed in detail later

MISCELLANEOUS

The options under miscellaneous include:

- A. Filters
- B. Reports
- C. Export data
- D. Balance

The Budget Office has put together a group of reports to help you with the budgeting process. Two of these reports are edit reports. If you have done your budget correctly, these two reports will be blank.

CHANGE PASSWORD – this would give you the option of changing your Hawk ID.

LOGOUT

SALARY PLANNING

FILLED POSITIONS

Record: << <- 1 go -> >> of 4 (filtered) ...Adhoc Filter

Name	SSN	EmplID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc		
		1032991 2	14-2500	2	87,516	0	-100.00		
Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00045346	Professor	FT11		Prof	8	2	7,956	0	-100.00

Working Budget [MFK Splits](#) | [Current Budget](#) | [Salary History](#) | [Other Amounts](#)

New Position Salary	% Inc	\$ Inc	<input type="button" value="Distribute"/>	<input type="button" value="Set Posn Sal"/>	Click here to distribute Reclass/Promo and Other amounts
---------------------	-------	--------	---	---	--

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd		
<input type="checkbox"/>	050	14	2500	10000	00000000	5002	160	000000	40	4710	7,956	7,956	0	0	0.00	I
Totals:									7,956	7,956	0	0	0.00			

[show increases/user fields](#)

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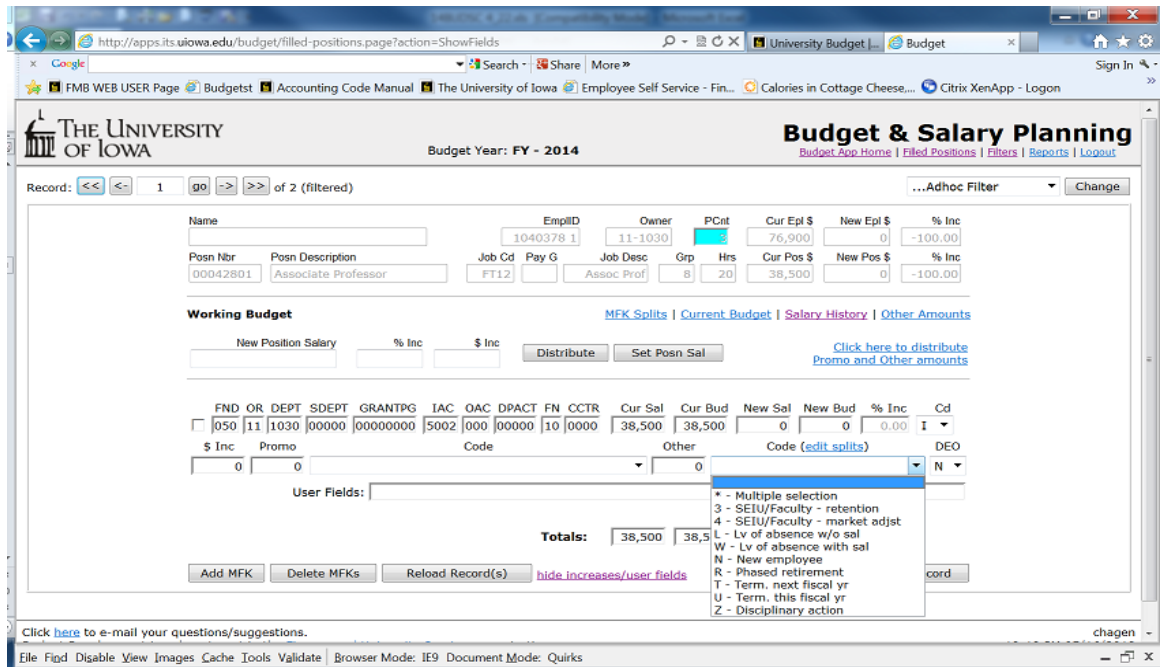
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[Budget Office](#) | [FUS Portal](#)

1. **New Position Salary:** enter salary here to distribute across MFK's or Update Position Salary.
2. **% Inc:** enter the percent of raise you plan to give (2 % enter 2). The increase will be calculated on the Current Salary.
3. **\$ Inc:** enter the dollar amount of the raise. The increase will be added to the Current Salary.

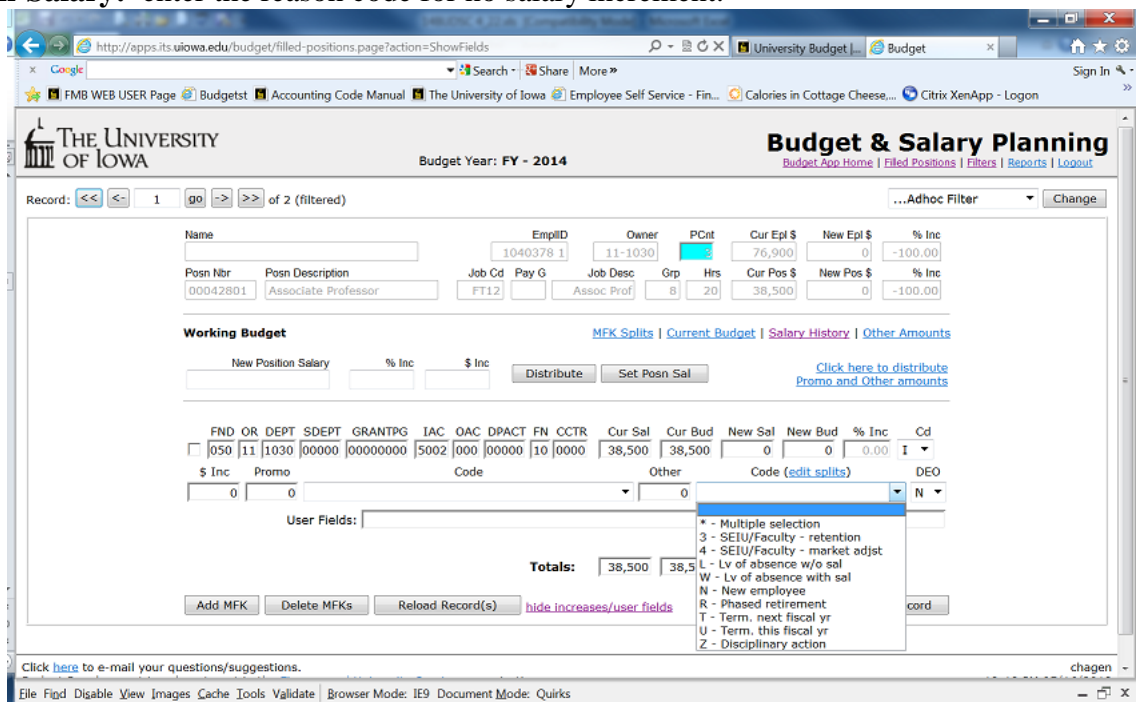
To see Promo and Other amounts and their codes, you must click on “show increases/user fields”.

4.Promo: enter the dollar amount of the promotion or reclassification dollars you want to give. *This will be done after you enter New Position Salary, % Inc, or \$ Inc.* You will have the option to add or not add the dollars to a New Salary. A Reclassification/Promotion code should be assigned to all reclassifications and promotions.

- Other:** enter the dollar amount of the other dollars you want to give. This *will be done after you* to enter New Position Salary, % Inc, or \$ Inc. You will have the option to add or not add the dollars to a New Salary.



- Non-Salary:** enter the reason code for no salary increment.



- Distribute:** distributes the dollars in New Position Salary, % Inc, \$ Inc, Promo/Reclass, or Other based on the ratio of the Current Salary (per MFK) to the sum of Current Salary. It will only distribute across those MFK's you have access to.

8. Update New Position Salary: the use of this button is optional but *highly recommended* with a shared position. It sets the New Position Salary before any distribution takes place. This will help determine what dollar amount each org is responsible for funding. This button is not visible for General Service staff or for positions you do not own.

9. Merit Positions: your merit salaries have been updated and loaded by HR. You cannot change the New Pos salary. You may change, add or delete MFK's. You will change MFK's by going directly into the MFK line.

Record: << <- 1 go -> >> of 1 (filtered) ...Adhoc Filter Change

Name	SSN	EmpID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		1029109 0	13-2280	1	35,872	36,722	2.37

Posn Nbr: 00003363 Posn Description: CLERK III Job Cd: CB12 Pay G: 08 Job Desc: Clk III Grp: 1 Hrs: 40 Cur Pos \$: 35,872 New Pos \$: 36,722 % Inc: 2.37

Working Budget [Current Budget](#) [Salary History](#) [Other Amounts](#)

Note: You can't distribute funds to this position because:

- This is a Merit position, funds have already been distributed. You can update individual MFKs, but the New Position Salary should not change.

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd		
<input type="checkbox"/>	240	13	2280	00900	00000000	5402	000	00000	10	0000	35,872	35,872	36,722	36,722	2.37	I
Totals:									35,872	35,872	36,722	36,722	2.37			

Add MFK Delete MFKs [show increases/user fields](#) Save Record

There may be rounding errors with the New Position salary and the New Salary in the MFK field when the data is initially loaded from HR. Please adjust your MFK salary to equal your New Position salary amount or you will not balance.

- 10. Pay Basis 9:** HR has provided the pay basis 9 records for informational purposes only. You cannot change any of these records. HR will not be taking these records back. You must submit the appropriate paperwork to HR to change these records.

Record: << <- 498 go -> >> of 983 (No filter selected) Change

Name	SSN	EmpID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		1021591 1	18-4000	2	47,877	49,792	4.00

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00007339	CLINICAL ASSISTANT	FC17		Clinic Asst	9	40	0	0	0.00

Working Budget [Current Budget](#) | [Salary History](#) | [Other Amounts](#)

Note: You can't distribute funds to this position because:

- Pay Group 9 positions can't be updated.

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd
050	18	4000	00090	00000000	5003	000	00000	10	0000	0	0	0	0	0.00
Totals:										0	0	0	0	0.00

Add MFK Delete MFKs [show increases/user fields](#) Save Record

WORKING BUDGET

Record: << < 1 go > >> of 4 (filtered) ...Adhoc Filter Change

Name	SSN	EmplID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		1032991 2	14-2500	2	87,516	0	-100.00

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00045346	Professor	FT11		Prof	8	2	7,956	0	-100.00

Working Budget [MFK Splits](#) | [Current Budget](#) | [Salary History](#) | [Other Amounts](#)

New Position Salary: % Inc: \$ Inc: [Click here to distribute Reclass/Promo and Other amounts](#)

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd		
<input type="checkbox"/>	050	14	2500	10000	00000000	5002	160	00000	40	4710	7,956	7,956	0	0	0.00	I

\$ Inc: Promo: Code: Other: Code (edit splits): DEO:

User Fields:

Totals: 7,956 7,956 0 0 0.00

[hide increases/user fields](#)

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1. **MFK Distribution:** allows the user to change, add or delete the MFK if you have the access rights.
2. **Current Salary:** current salary amount paid from HR on this MFK distribution.
3. **Current Budget:** this field is populated with the budget amount you assigned in the New Budget field last year or changed in Budget Management during the year. *Please Note:* you may change this by double clicking in the field if you want to change a dollar amount. However, the amount you change is for your reference only and will not go anywhere.
4. **New Salary:** this is the salary amount you want charged to the assigned MFK and will be sent to Human Resources (HR). This is updated by the distribution button or by clicking right in the cell itself.
5. **New Budget:** this is the dollar amount you want to go to the General Ledger. It will automatically default to equal the new salary. You may change the amount to reflect an over/under-funded position by clicking in the cell itself. You or we will use the dollars in this field to balance your budget. This amount will feed the Position Management Application and will be brought back to the Current Budget field in next year's budget process.

6. **Budg Stat CD:** when you first open your budget application there will be an “I” in the box. This stands for the initial load from HR. The “F” stands for final. You may put an F in the box when you are through working this MFK. This is a suggestion if you share a position with some other department. It is an optional code for those who choose to use it. Please see below for the definition of other budget status codes A, C, D, and N.

The screenshot displays the 'Budget & Salary Planning' application. At the top, it shows the University of Iowa logo and navigation links. The main content area includes a record summary for a Professor (Posn Nbr: 00045346, Job Desc: Prof, Grp: 8, Hrs: 2) with a current salary of 7,956. Below this is a 'Working Budget' section with fields for 'New Position Salary', '% Inc', and '\$ Inc', along with 'Distribute' and 'Set Posn Sal' buttons. A table below the working budget section lists various budget codes and their corresponding amounts. A dropdown menu for status codes is open, showing options I, F, C, and D. The 'Totals' row shows a current salary of 7,956 and a current budget of 7,956. At the bottom, there are buttons for 'Add MFK', 'Delete MFKs', 'Reload Record(s)', and 'Save Record'.

Status Codes – **I** is for the initial load, **A** is an addition to a record, **C** is there was a change to this record, **D** is for delete, **N** is for a new recorded added, and **F** is for final.

Budget - Microsoft Internet Explorer

Address: http://web-farm3.its.uiowa.edu/budget/filled-positions.page?action=ShowFields

THE UNIVERSITY OF IOWA **Budget & Salary Planning**

Budget App Home | Filled Positions | Filters | Reports | Logout

Record: 1 of 1 (filtered) ...Adhoc Filter Change

Name	SSN	EmplID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		1072310 0	17-3230	1	45,230	0	-100.00

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00043075	Fellow Associate	FF16		Fel Assoc	1	40	45,230	0	-100.00

Working Budget [MFK Splits](#) | [Current Budget](#) | [Salary History](#) | [Other Amounts](#)

New Position Salary % Inc \$ Inc [Click here to distribute Reclass/Promo and Other amounts](#)

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd		
<input type="checkbox"/>	990	17	3230	19000	54001200	5055	0000	000000	00	6971	45,230	45,230	0	0	0.00	I

\$ Inc Promo Code Other Code (edit splits) DEO

User Fields:

Totals: 45,230 45,230 0 0 0.00

[hide increases/user fields](#)

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Increase/User Field

Will only display the MFK's to which you have access rights. Will display incremental increase to the MFK for \$Inc., Promo, and Other increases. These amounts can be updated directly in the cell. The "Code" next to "Other" will change to NonSal if the amount in "Other" box is for a Non-salary related increase. You cannot give an "Other" increase and use the Non-salary code at the same time.

User 1-4: User code fields are optional and can be used at your own discretion. User 1 will hold up to 50 characters, User 2 & 3 will each hold 10 and User 4 is a numeric field. User codes will not go anywhere but will be saved.

DEO: Indicates if an individual is a Department Executive Officer.

- O- Officer
- N- Not an Officer

Budget - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://web-farm3.its.uiowa.edu/budget/filled-positions.page?tab=current

THE UNIVERSITY OF IOWA **Budget & Salary Planning**
[Budget Office](#) | [Budget App Home](#) | [Filled Positions](#) | [Filters](#) | [Reports](#) | [Logout](#)

Record: << <- 4 go -> >> of 406 (No filter selected) Change

Name	SSN	EmplID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc		
		1040378 1	11-1030	2	47,800	0	-100.00		
Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00042801	ASST PROFESSOR	FS13		Ast Prof	8	20	23,300	0	-100.00

[Working Budget](#) **Current Budget** | [Salary History](#) | [Other Amounts](#)

FND	OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Current Sal	Current Bud
050	11	1030	00000	00000000	5002	000	00000	10	0000	23,300	23,300
Total										23,300	23,300

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Done Internet

Current Budget

These are non-updateable fields and for reference use only. It displays current MFK's and salary distribution. If you change the current budget on the Working Budget, you will always be able to come back to this screen to see the current budget you started with.

http://apps.its.uiowa.edu/budget/filled-positions.page?tab=history

University Budget | Budget

THE UNIVERSITY OF IOWA Budget Year: FY - 2013

Budget & Salary Planning

Record: 1 of 2 (filtered)

Name	EmplID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
	1040378 1	11-1030		74,700	76,900	2.95

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00042801	Associate Professor	FT12		Assoc Prof	B	20	37,300	38,500	3.22

Working Budget | MFK Splits | Current Budget | **Salary History** | Other Amounts

Year	Sal Amount	% Increase
2012	74,700	1.69 %
2011	73,460	2.14 %
2010	71,920	0.00 %
2009	71,920	5.73 %
2008	68,024	9.59 %
2007	62,074	9.10 %
2006	56,898	12.09 %
2005	50,762	2.32 %
2004	49,613	3.79 %
2003	47,800	4.82 %
2002	45,600	4.11 %
2001	43,800	

Salary History

Salary history comes from previous years' budget applications and reflects salary as of July 1 of that fiscal year.

EXAMPLES

ONE POSITION / ONE OWNER / MULTIPLE FUNDING SOURCES

Record: << <- 1 go -> >> of 1 (filtered) ...Adhoc Filter Change

Name	SSN	EmplID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		1007263 0	05-0305	1	57,068	0	-100.00

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00014672	Administrative Associate	PA23	10	Administra	1	40	57,068	0	-100.00

Working Budget [MFK Splits](#) | [Current Budget](#) | [Salary History](#) | [Other Amounts](#)

New Position Salary % Inc \$ Inc [Click here to distribute Reclass/Promo and Other amounts](#)

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd		
<input type="checkbox"/>	050	05	0305	80000	50501800	5202	000	00000	60	0000	28,534	28,534	0	0	0.00	I
<input type="checkbox"/>	450	05	0307	00733	00000000	5202	000	00000	00	0000	28,534	28,034	0	0	0.00	I
Totals:									57,068	56,568	0	0	0.00			

[show increases/user fields](#)

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Salary increases are distributed over the multiple MFK lines based upon the same ratio of the Current Salary (per MFK) to the sum of Current Salary.

SHARED POSITION - YOU OWN

Record: << < < 1 go > > > of 2 (filtered) ...Adhoc Filter Change

Name	SSN	EmplID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		1010992 0	17-3260	1	140,000	0	-100.00

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00015439	Associate Professor(Clinical)	FQ12		Asc Pr(Cl)	1	40	140,000	0	-100.00

Working Budget [MFK Splits](#) | [Current Budget](#) | [Salary History](#) | [Other Amounts](#)

New Position Salary: % Inc: \$ Inc: [Click here to distribute Reclass/Promo and Other amounts](#)

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd		
<input type="checkbox"/>	050	17	3260	000000	000000000	5004	000	000000	10	8896	10,000	10,000	0	0	0.00	I
<input type="checkbox"/>	180	80	8400	000000	000000000	5004	000	000000	31	8896	27,600	0	0	0	0.00	I
<input type="checkbox"/>	990	17	3260	000000	540022000	5015	000	000000	00	8896	102,400	102,400	0	0	0.00	I
Totals:									140,000	112,400	0	0	0	0.00		

[show increases/user fields](#)

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All MFK distributions on this position will be viewable. Only the MFK's you have access rights to will be updateable. Distributions will continue to maintain the same ratio to total as the current salary but distribution will only occur to your MFK's.

It is **highly recommended** that you use the Set Posn Sal button on all shared positions. The application will not allow balancing if the New Position Salary does not equal the sum of the New Salary on each MFK.

The Increases/Users Fields tab will only show MFK's which you can update.

SHARED POSITION - YOU DON'T OWN

Budget & Salary Planning
[Budget App Home](#) | [Filled Positions](#) | [Filters](#) | [Reports](#) | [Logout](#)

Record: 1 of 1 (filtered) | ...Adhoc Filter | Change

Name	SSN	EmplID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
	1025980 0	13-2410	1		74,000	0	-100.00

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00016577	Health Svcs Admin II	PH08	12	Hlth Svc 2	1	40	74,000	0	-100.00

Working Budget | [MFK Splits](#) | [Current Budget](#) | [Salary History](#) | [Other Amounts](#)

New Position Salary: % Inc: \$ Inc: [Distribute](#) | [Click here to distribute Reclass/Promo and Other amounts](#)

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd		
<input type="checkbox"/>	170	70	7280	08100	00000000	5202	000	00000	31	0000	14,816	14,816	0	0	0.00	I
<input type="checkbox"/>	993	13	2410	00130	00000000	5202	000	00000	00	0000	29,592	24,275	0	0	0.00	I
<input type="checkbox"/>	993	13	2410	00150	00000000	5202	000	00000	00	0000	29,592	24,276	0	0	0.00	I
Totals:											74,000	63,367	0	0	0.00	

[Add MFK](#) | [Delete MFKs](#) | [Reload Record\(s\)](#) | [show increases/user fields](#) | [Save Record](#)

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This is exactly like the Shared Position-You Own except the Set Posn Sal button will not be visible. You do not have the right to update New Position Salary for a position you do not own.

MULTIPLE POSITIONS

Budget & Salary Planning
[Budget App Home](#) | [Filled Positions](#) | [Filters](#) | [Reports](#) | [Logout](#)

Record: << <- 1 go -> >> of 2 (filtered) ...Adhoc Filter Change

Name	SSN	EmpID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		1020194 0	17-3000	2	21,000	0	-100.00

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00104654	Graduate Research Assistant	FR19		Grad Ra	1	10	1,032	0	-100.00

Working Budget [MFK Splits](#) | [Current Budget](#) | [Salary History](#) | [Other Amounts](#)

New Position Salary % Inc \$ Inc [Click here to distribute Reclass/Promo and Other amounts](#)

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd
<input type="checkbox"/>	050	17	3000	41000	72002800	5045	000	00000	1,032	0	0	0	0.00	1

Totals: 1,032 0 0 0 0.00

[show increases/user fields](#)

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Record: << <- 2 go -> >> of 2 (filtered) ...Adhoc Filter Change

Name	SSN	EmpID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		1020194 1	17-3000	2	21,000	0	-100.00

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00830002	Scholar/Trainee	FT52		Schol Tran	1F	0.01	19,968	0	-100.00

Working Budget [MFK Splits](#) | [Current Budget](#) | [Salary History](#) | [Other Amounts](#)

New Position Salary % Inc \$ Inc [Click here to distribute Reclass/Promo and Other amounts](#)

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd
<input type="checkbox"/>	050	17	3000	41000	71886400	5610	000	00000	19,968	0	0	0	0.00	1

Totals: 19,968 0 0 0 0.00

[show increases/user fields](#)

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09:49 AM 05/03/2004
[Budget Office](#) | [FUS Portal](#)

If an employee has multiple positions, you will see all of their positions if you are responsible for any part of their salary. This will allow the user to see all positions comprising the New Employee Salary. Remember that you will only be able to update the position that you own.

UNFILLED POSITIONS

Record: << <- 1 go -> >> of 2 (filtered) ...Adhoc Filter Change

Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Hrs	Owner	SubDept
00000667	Accountant	PB16	06	Accountant	40	05-0305	50000

FND OR DEPT SDEPT GRANTPG IAC OAC DPACT FN CCTR Cur Budg New Budg Cd

05 0305 50000 5200 0 0 0 0 0 0 I

Add MFK Delete MFKs Reload Record(s) Save Record

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10:22 AM 05/03/2004
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The application allows the user to assign an MFK and budget amount to an unfilled position. Only the MFK and the budget amount will go to the general ledger. The position number, MFK, and budget amount will be fed to the Budget Management Application. None of this information will be taken back to HR. If you want to change ownership of the position, you will have to submit the proper paperwork to the Human Resource Department

The Iact is defaulted to the budget iacct based upon the job code.

HR has provided the Org, Dept, and Sub-Dept from their files.

You may add an unfilled position to the working budget without a position number.

Assigning an MFK and budget amount is strictly for GL and Budget Management purposes. Again, HR will not take any of the unfilled position changes back.

GE / REVENUE

Budget & Salary Planning
[Budget Office](#) | [Budget App Home](#) | [Filled Positions](#) | [Filters](#) | [Reports](#)

[Click here](#) to export this data as a comma-delimited file or Excel spreadsheet (No filter selected)

Click on the MFK to view, edit or delete that record. [Click here to create a new record](#)

MFK	Name/Desc	Current Budget	New Budget
050 17 3000 00000 00000000 6070 999 00000 40 0000	GENERAL EXPENSE	148,134	148,134
050 17 3000 20000 00000000 6070 999 00000 21 0000	GENERAL EXP	52,180	52,180
050 17 3005 00000 00000000 6070 999 00000 10 0000	GENERAL EXPENSE	49,267	49,267
050 17 3005 00000 53390100 6070 999 00000 10 0000	PHONE REVERSION	227,011	227,011
050 17 3005 00000 53390100 6270 999 00000 10 0000	COLLEGE OF MEDICINE-VOICE REVERSION	-227,102	-227,102
050 17 3010 00000 00000000 6070 999 00000 10 0000	GENERAL EXPENSE	8,556	8,556
220 17 3015 00000 53415000 6235 800 00000 10 0000	YEAR END ADJ	5,038	5,038
220 17 3015 00000 53415000 6235 800 02900 10 0000	BROADLAWNS	250,000	250,000
220 17 3015 00000 53415000 6235 800 02901 10 0000	CEDAR RAPIDS (ST. LUKE'S)	250,000	250,000
220 17 3015 00000 53415000 6235 800 02903 10 0000	IOWA LUTHERAN	250,000	250,000
220 17 3015 00000 53415000 6235 800 02904 10 0000	DAVENPORT (DMEF)	250,000	250,000
220 17 3015 00000 53415000 6235 800 02905 10 0000	MASON CITY (NIMHC)	250,000	250,000
220 17 3015 00000 53415000 6235 800 02906 10 0000	SIoux CITY (SMEF)	250,000	250,000
220 17 3015 00000 53415000 6235 800 02907 10 0000	WATERLOO (NEIMEF)	250,000	250,000
220 17 3015 00000 53415200 5925 000 00000 10 0000	HOURLY WAGES	20,000	20,000

All GE and Revenue amounts are listed with Current Budget equal to New Budget. You have the option to change the New Budget.

All MFK's are unique with one description. If you would like to add a new general expense or revenue amount with a unique description, the new MFK must also be unique.

GE/Revenue continued

You must click any where on the MFK to change it. Another popup screen will appear for you to enter your changes.

Budget - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media Print Mail

Address http://web-farm3.its.uiowa.edu/budget/general-expense.page?action=edit&id=1871164 Go Links >>

THE UNIVERSITY OF IOWA

Budget & Salary Planning
[Budget Office](#) | [Budget App Home](#) | [Filled Positions](#) | [Filters](#) | [Reports](#)

Record: << <- 1 go -> >> of 57 (No filter selected) Change

MFK: 050 17 3000 00000 00000000 6070 999 00000 40 0000

Name/Desc: GENERAL EXPENSE

Cur Budget: 148134

New Budget: 148134

Save Changes Reload Record [Click here to return to the General Expense list](#) Delete Record

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Internet

GE/Revenue Continued

You must click on [General Expense & Revenue](#) on the home page if you want to add additional general expense or revenue lines. You cannot add them from the “working budget screen”.

To create a new General Expense or Revenue line click where it says “Click here to create new record” and this popup box will appear for you to fill in.

Budget - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media Print Mail News RSS

Address <http://web-farm3.its.uiowa.edu/budget/general-expense.page?action=create> Go Links >>

THE UNIVERSITY OF IOWA

Budget & Salary Planning

[Budget Office](#) | [Budget App Home](#) | [Filled Positions](#) | [Filters](#) | [Reports](#)

Record: << <- 58 go -> >> of 58 (No filter selected) Change

MFK: [] [] [] [] [] [] [] [] [] []

Name/Desc: UNTITLED GENERAL EXPENSE

Cur Budget: 0

New Budget: 0

Save New Record Cancel

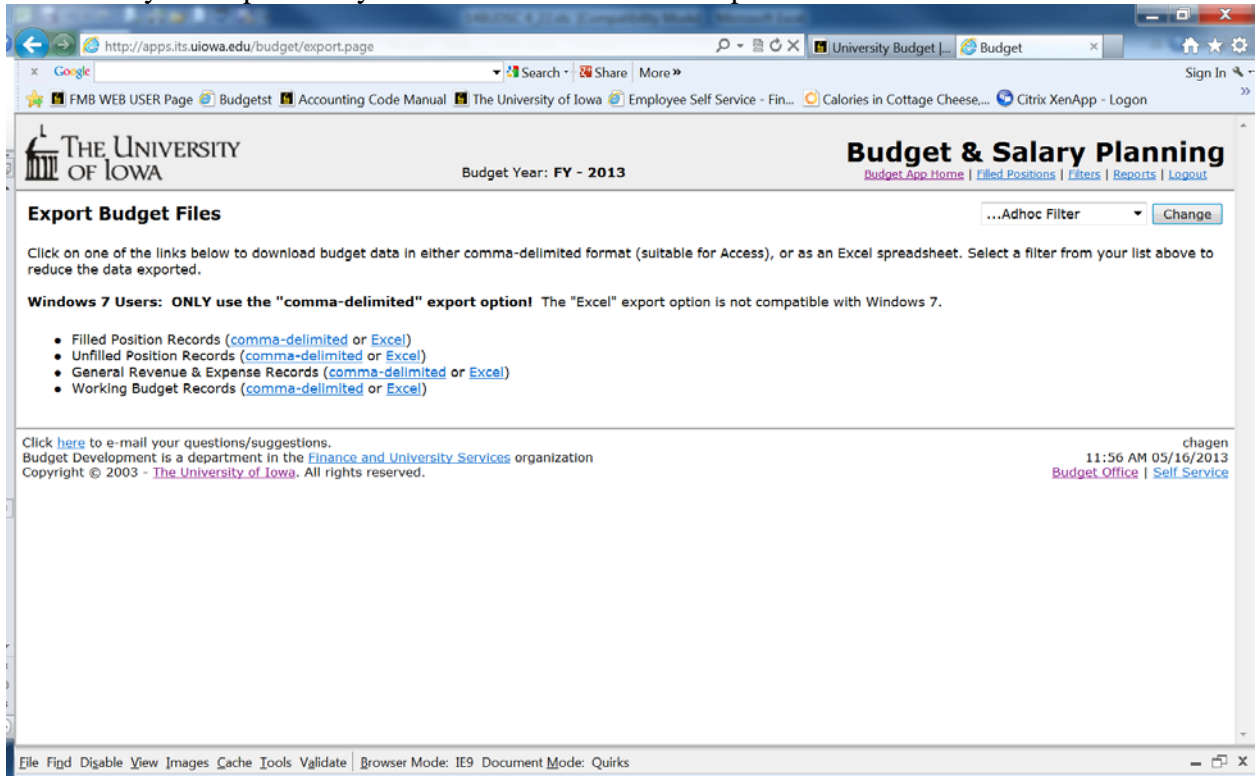
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Done Internet

GE/Revenue Continued

You may export this data as a comma-delimited file or Excel spreadsheet. Just click on where it says to export and your instructions will come up.



The screenshot shows a web browser window displaying the 'Budget & Salary Planning' application. The page title is 'Budget & Salary Planning' and the budget year is 'FY - 2013'. The main heading is 'Export Budget Files'. Below this heading, there is a dropdown menu for 'Adhoc Filter' and a 'Change' button. The text instructs users to click on links to download budget data in either comma-delimited format or as an Excel spreadsheet. A note for Windows 7 users states: 'ONLY use the "comma-delimited" export option! The "Excel" export option is not compatible with Windows 7.' A bulleted list provides the following options:

- Filled Position Records ([comma-delimited](#) or [Excel](#))
- Unfilled Position Records ([comma-delimited](#) or [Excel](#))
- General Revenue & Expense Records ([comma-delimited](#) or [Excel](#))
- Working Budget Records ([comma-delimited](#) or [Excel](#))

At the bottom of the page, there is a footer with contact information: 'Click [here](#) to e-mail your questions/suggestions. Budget Development is a department in the [Finance and University Services](#) organization. Copyright © 2003 - [The University of Iowa](#). All rights reserved.' The footer also includes the name 'chagen', the date '11:56 AM 05/16/2013', and links for 'Budget Office' and 'Self Service'. The browser's status bar at the bottom indicates 'Browser Mode: IE9 Document Mode: Quirks'.

You will also have the options to download your starting budget tables. Please follow the instructions above.

WORKING BUDGET

Budget & Salary Planning

[Click here](#) to export this data as a comma-delimited file or Excel spreadsheet
[Click here](#) to apply a percentage across updateable filled position records. (No filter selected)

Click on the MFK to view, edit or delete that record. [Click here to create](#)

TC	MFK	Name/Desc	Cur Bud	Cur Sal	New Bud
UP	050 33 4300 00010 00000000 5000 000 00000 40 0000	JULY 1 BUDGET	0	0	0
FP	050 33 4300 00010 00000000 5002 005 00000 40 0000	Name	151,424	151,424	154,452
FP	050 33 4300 00010 00000000 5035 528 00000 40 0000	Name	18,780	18,780	18,780
FP	050 33 4300 00010 00000000 5035 528 00000 40 0000	Name	0	18,780	18,780
FP	050 33 4300 00010 00000000 5035 528 00000 40 0000	Name	18,780	18,780	18,780
FP	050 33 4300 00010 00000000 5035 528 00000 40 0000	Name	18,780	18,780	18,780
FP	050 33 4300 00010 00000000 5035 528 00000 40 0000	Name	18,780	18,780	18,780
UP	050 33 4300 00010 00000000 5035 000 00000 40 0000	JULY 1 BUDGET	265	0	0
FP	050 33 4300 00010 00000000 5045 635 00000 40 0000	Name	0	18,780	18,780
FP	240 33 4300 00078 00000000 5045 419 00000 40 0000	Name	0	3,424	3,424
FP	520 33 4300 00000 86003200 5045 333 00000 40 0000	Name	0	18,780	18,780
FP	520 33 4300 00000 86003200 5045 333 00000 40 0000	Name	0	18,780	18,780
FP	050 33 4300 00010 00000000 5045 635 00000 40 0000	Name	17,215	18,780	18,780
FP	050 33 4300 00010 00000000 5045 528 00000 40 0000	Name	0	18,780	18,780

This displays all budget entries (Filled, Unfilled, and GE/Revenue) in a format similar to a table. You may “Click here” at the top of the page to apply a percentage increase to all the current salaries in the filtered group. This will not work on GE/Revenue, Merit or Unfilled Position entries. GE must be entered in the New Budget field only.

You may add salary dollars to the GL without a position number attached. You must do this on the Working Budget display by “Click here” at the top of the page. This record will appear with an UP as the position type code. The UP dollar amount must be placed in the New Budget field. If the description is left blank, it will default to “Unallocated F, P, G or GA/RA” depending on the iacct when the budget is downloaded into the general ledger.

Working Budget Continued

You may also download the Working Budget as a comma –delimited or Excel file. See excel file example below. This is an excel example.

The top screenshot shows the Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L
1	BUDG_WL	BUDG_CU	BUDG_TY	BUDG_YR	GL_FUND	GL_ORG	GL_DEPT	GL_SUB	GL_GRAN	GL_INST	GL_ORG	GL_DEF
2	1868506	2716228	UP	2004		01	0060	00000		5200		
3	1873697	2721419	UP	2004	050	01	0060	00000	00000000	5200	000	00000
4	1861670	2709392	FP	2004	050	01	0060	00000	00000000	5202	000	00000
5	1857552	2705274	FP	2004	050	01	0060	00000	00000000	5202	000	00000
6	1866318	2714040	FP	2004	260	01	0060	00000	00000000	5202	000	00000
7	1866324	2714046	FP	2004	050	01	0060	00000	00000000	5202	000	00000
8	1860842	2708564	FP	2004	050	01	0060	00000	00000000	5202	000	00000
9	1862546	2710268	FP	2004	050	01	0060	00000	00000000	5202	000	00000
10	1862547	2710269	FP	2004	260	01	0060	00000	00000000	5202	000	00000
11	1862759	2710481	FP	2004	260	01	0060	00000	00000000	5202	000	00000
12	1853945	2701667	FP	2004	050	01	0060	00000	00000000	5202	000	00000
13	1873698	2721420	UP	2004	050	01	0060	00000	00000000	5202	000	00000
14	1847317	2695039	FP	2004	050	01	0060	00000	00000000	5202	000	00000
15	1868505	2716227	UP	2004		01	0060	00000		5400		
16	1873699	2721421	UP	2004	050	01	0060	00000	00000000	5400	000	00000
17	1869534	2717256	GE	2004	050	01	0060	00000	00000000	6070	000	00000
18	1869535	2717257	GE	2004	050	01	0060	00000	00000000	6270	000	00000

The bottom screenshot shows the same data with values enclosed in quotes, representing a comma-delimited file:

	A	B	C	D	E	F	G	H	I	J	K	L
1	BUDG_WL	BUDG_CU	BUDG_TY	BUDG_YR	GL_FUND	GL_ORG	GL_DEPT	GL_SUB	GL_GRAN	GL_INST	GL_ORG	GL_DEF
2	"1868506"	"2716228"	"UP"	"2004"	"null"	"01"	"0060"	"00000"	"null"	"5200"	"null"	"null"
3	"1873697"	"2721419"	"UP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5200"	"000"	"00000"
4	"1861670"	"2709392"	"FP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
5	"1857552"	"2705274"	"FP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
6	"1866318"	"2714040"	"FP"	"2004"	"260"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
7	"1866324"	"2714046"	"FP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
8	"1860842"	"2708564"	"FP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
9	"1862546"	"2710268"	"FP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
10	"1862547"	"2710269"	"FP"	"2004"	"260"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
11	"1862759"	"2710481"	"FP"	"2004"	"260"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
12	"1853945"	"2701667"	"FP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
13	"1873698"	"2721420"	"UP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
14	"1847317"	"2695039"	"FP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5202"	"000"	"00000"
15	"1868505"	"2716227"	"UP"	"2004"	"null"	"01"	"0060"	"00000"	"null"	"5400"	"null"	"null"
16	"1873699"	"2721421"	"UP"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"5400"	"000"	"00000"
17	"1869534"	"2717256"	"GE"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"6070"	"000"	"00000"
18	"1869535"	"2717257"	"GE"	"2004"	"050"	"01"	"0060"	"00000"	"00000000"	"6270"	"000"	"00000"

This is an example of a comma –delimited file.

FILTERS

In this application there are two kinds of filters, a quick filter and an advanced filter.

Quick Filter

The quick filter will allow you to filter on a limited number of fields, fields that are commonly used. You may name and save the filter to use at another time, or you may just apply the filter for a one time use.

The screenshot shows the 'Budget & Salary Planning' application in a Microsoft Internet Explorer browser. The address bar shows 'http://web-farm3.its.uiowa.edu/budget/filter.page'. The page header includes 'THE UNIVERSITY OF IOWA' logo and navigation links: 'Budget Office', 'Budget App Home', 'Filled Positions', 'Filters', 'Reports', and 'Logout'. The main content area is titled 'Budget & Salary Planning' and contains a 'Filter Mode' section with 'Quick' and 'Advanced' options. Below this is a list of filters: 'Unsaved Filters' (No filters available), 'Saved Filters' (No filters available), and 'System Filters' (System Test Filter). A 'Select' button is at the bottom of this list. To the right, the 'Filter Name' field is empty, with 'Save Filter' and 'Delete Filter' buttons. Below this are input fields for 'MFK:', 'Owner:', 'Pay Group:', 'Job Code:', and 'Status Code:'. A row of checkboxes is labeled 'FND OR DEPT SDEPT GRANTPG IAC OAC DPACT FN CCTR'. At the bottom of the filter section are 'Clear Filter', 'Clear Fields', and 'Apply Filter' buttons.

Once you are finished with your filter, and you want to go back to your original view, you must go to the drop down menu at the top of the page and select “(No filter selected)”.

The screenshot shows the 'Budget & Salary Planning' application in a Microsoft Internet Explorer browser. The address bar shows 'http://web-farm3.its.uiowa.edu/budget/unfiled-positions.page'. The page header includes 'THE UNIVERSITY OF IOWA' logo and navigation links: 'Budget Office', 'Budget App Home', 'Filled Positions', 'Filters', 'Reports', and 'Logout'. The main content area shows a table of positions. Above the table is a record navigation bar: 'Record: << <- 1 go -> >> of 1'. A dropdown menu is open, showing options: '(No filter selected)', '(No filter selected)', 'Unsaved Filters' (Adhoc Filter), 'Saved Filters' (No filters available), and 'System Filters' (System Test Filter). Below the table is a row of checkboxes labeled 'FND OR DEPT SDEPT GRANTPG IAC OAC DPACT FN CCTR'. At the bottom of the page are 'Add MFK', 'Delete MFKs', and 'Save Record' buttons.

Advanced Filter

The screenshot shows a web browser window titled "Budget - Microsoft Internet Explorer" with the address bar displaying "http://web-farm3.its.uiowa.edu/budget/filter-advanced.page?redirect=/home.page". The page header includes "THE UNIVERSITY OF IOWA" logo and "Budget & Salary Planning" title, with navigation links for "Budget Office", "Budget App Home", "Filled Positions", "Filters", "Reports", and "Logout".

The main content area is titled "Mode: Quick | Advanced". On the left, there is a sidebar with filter categories: "Unsaved Filters" (containing "...Adhoc Filter"), "Saved Filters" (containing "... (No filters available)"), and "System Filters" (containing "...System Test Filter"). A "Select" button is located at the bottom of this sidebar.

The main filter configuration area includes:

- A "Name:" field with a "Save Filter" button and a "Delete Filter" button.
- A "Filter Rules:" section with a "(add column)" link and four rows of dropdown menus for selecting filter criteria.
- Two radio button options: "Filtered records must match **all** rules (AND)" and "Filtered records can match **any** rules (OR)".
- A "Sort by:" section with two dropdown menus and radio button options for "Ascending" and "Descending" sorting.
- Buttons for "Clear Filter", "Clear Fields", and "Apply Filter" at the bottom.

This close-up shows a dropdown menu with two columns of options. The left column lists various criteria: "MFK: FND", "MFK: OR", "MFK: DEPT", "MFK: SDEPT", "MFK: GRANTPG", "MFK: IAC", "MFK: OAC", "MFK: DPACT", "MFK: FN", and "MFK: CCTR". The right column lists comparison operators: "Equals", "Not Equals", "Contains", "Starts With", "Ends With", "Greater Than", "Less Than", and "Like". The "Starts With" option is currently selected and highlighted in blue.

The advanced filter allows you to filter with many different criteria. The screen shows only four but you can add more rows by clicking (add column). Again, these filters may be named and saved for future use or you may just apply it for one time use.

Remember in the filled position screen the data is loaded owner of the position first, then org-dept. You may resort the data using the filter screen. At the bottom of the filter screen, use the "Sort by".

BALANCE

Budget & Salary Planning

[Budget Office](#) | [Budget App Home](#) | [Filled Positions](#) | [Filters](#) | [Reports](#) | [Logout](#)

Budget Group:

	Faculty	Exp	Revenue	Total
Fringe Budget:	0 2	0	0	48,369,423
Working Budget:	0 6	0	0	132,307,068
Total:	0 9	0	0	180,676,491

Note: The balance process can take a while for large budget groups.

Click [here](#) to e-mail your questions/suggestions. chaqen

If the user is responsible for more than one budget group, a screen to select a Budget Group will be displayed. After the selection is made, click OK.

The screenshot shows a web browser window titled "Budget - Microsoft Internet Explorer". The address bar shows ".uiowa.edu/budget/balance.page?balanceGroup=ACCOUNTS+PAYABLE+AND+TRAVEL&action=Balance+Budget+for+Group". The page header includes "THE UNIVERSITY OF IOWA" and "Budget & Salary Planning". Below the header, there is a "Budget Group" dropdown menu with "Name of Group" selected and a "Change" button. Two "Balance Error" messages are displayed: "Some position total salaries do not equal the sum of the detail salaries. Click here to view the report." and "Some position salaries are equal to zero. Click here to view the report." A table follows, comparing "Base Budget", "Working Budget", and "Difference" across categories: Faculty, P&S, Students, Merit, Gen Exp, Revenue, and Total. Below the table is a "Balance Budget for Group" button. A "Note" at the bottom states: "The balance process can take a while for large budget groups." The browser status bar shows "Done" and "Internet".

	Faculty	P&S	Students	Merit	Gen Exp	Revenue	Total
Base Budget:	0	312,448	0	952,596	276,546	0	1,541,590
Working Budget:	0	0	0	884,344	276,546	0	1,160,890
Difference:	0	312,448	0	68,252	0	0	380,700
Control Account:	0	0	0	0	0	0	0
Balance:	0	312,448	0	68,252	0	0	380,700

This panel displays the current status of your General Fund budget comparing it to the entered working budget. Basically it is a summary of the Control Sheet. Please make sure your Control Account line is all zeros. If it is not, go back to the working budget and put those excess dollars in a unfilled line and rebalance.

Balance Budget For Group button: There are two reports that will be run when you try to balance your group (see “Balance Error” above). If you have errors, you will be prevented from balancing. There is a link you may click to see your report. Once your budget is free of errors you may click the button “Balance Budget for Group”.

You will need to go back to the Report page and run these same reports for all your funds. Just leave the criteria blank and push “Run Report”.

REPORTS

The screenshot shows a web browser window displaying the "Budget & Salary Planning" page for the University of Iowa. The page header includes the university logo, the text "THE UNIVERSITY OF IOWA", and "Budget Year: FY - 2013". The main heading is "Budget & Salary Planning" with links for "Budget App Home", "Filled Positions", "Filters", "Reports", and "Logout".

The "Budget Reports" section contains a list of links:

- [Work Copy](#)
- [Control Sheet](#)
- [MFK Salary = \\$0](#)
- [New Position Salary != Sum of MFKs \(with owner\)](#)
- [Department Summary](#)
- [MFK Budget != MFK Salary](#)
- [Unfilled Positions](#)
- [Unfilled Positions Updated](#)
- [GE Entries](#)
- [GE Entries Updated](#)
- [Standard Hours Discrepancies](#)
- [Compensation Category](#)
- [Department Budget Analysis \(old CI0004\)](#)
- [Budget Detail Analysis \(old B00004\)](#)
- [HR Changes](#)
- [P&S Paygrade Minimum](#)
- [P&S Paygrade Maximum](#)
- [SEIU Paygrade Maximum](#)
- [P&S Percentage Increase Summary](#)
- [Faculty Percentage Increase Summary](#)
- [Salary Increase Out of Range](#)
- [Large Salary](#)
- [IACCT Control Sheet Balance](#)

To the right of the list is a section titled "Tips for printing reports" with the following advice:

- Printing support is better in IE than other browsers (IE supports page breaks)
- Make sure to choose a "Landscape" orientation under "Page Setup..."
- Reduce margins (.5" on a side works well)
- Under IE, use the following values for header and footers in "Page Setup..."
 - Header: &w
 - Footer: &D&bPage &p of &P

At the bottom of the page, there is a footer with contact information: "Click [here](#) to e-mail your questions/suggestions. Budget Development is a department in the [Finance and University Services](#) organization. Copyright © 2003 - [The University of Iowa](#). All rights reserved." The user "chagen" is logged in, and the date is "11:53 AM 05/16/2013". Links for "Budget Office" and "Self Service" are also present.

There are numerous reports provided for your use to help you do your budget and salary planning. We ask that you please run the “New Position Salary != Sum of MFK’s” and “MFK Salary = \$0” for all your funds. You cannot balance if there are names on these two reports.

Also run the “IACCT Control Sheet Balance” report. This will ensure you have made the correct category shifts with the appropriated fringe percentage.