

THE UNIVERSITY OF IOWA

BUDGET

AND

SALARY PLANNING

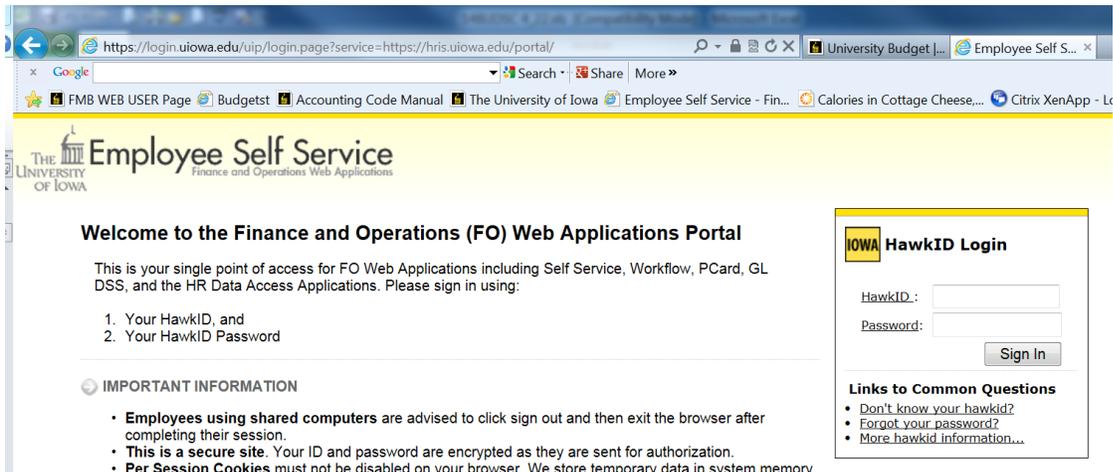
APPLICATION

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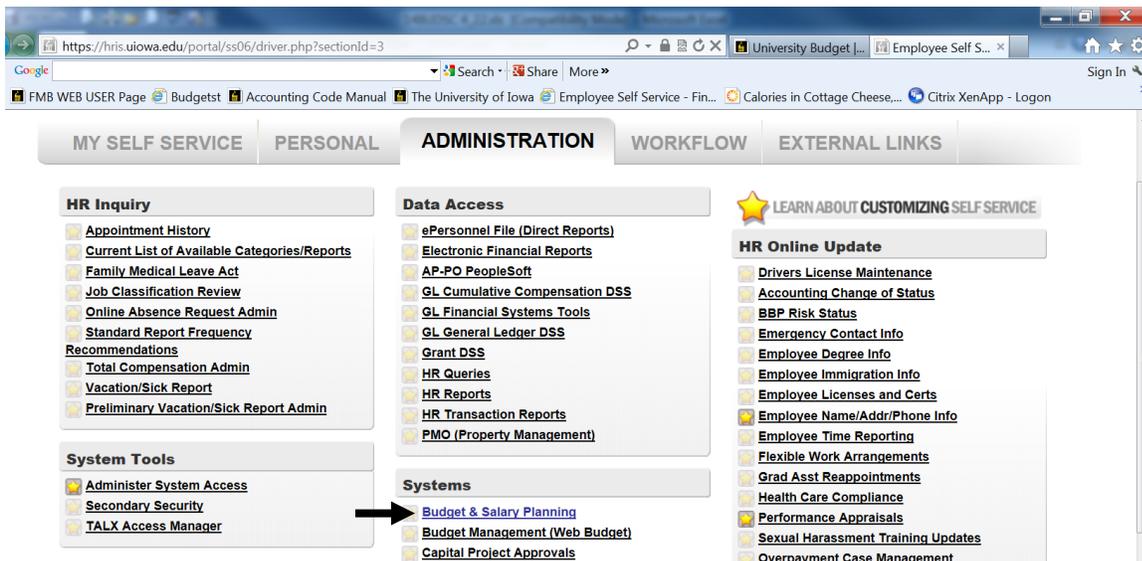
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LOGIN / ACCESS RIGHTS

Users will access the Budget & Salary Planning application through the Finance and Operations (FO) Web Applications Portal Self Service using their Hawk ID and password. If a user's Hawk ID is unknown, contact the ITS help desk at 335-6363.



Once in Self-Service, the application is found under Administration – Systems.



Budget Officers can request access to the budget application for individual users. The degree of access can be controlled to the departmental level. Once access is granted, the individual is 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 MENU



Budget Year: FY - 2014

Budget & Salary Planning

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

- **Salary Planning**
 - [Filled Positions](#)
 - [Unfilled Positions](#)
 - [General Expense & Revenue](#)
 - [Working Budget](#)
- **Miscellaneous**
 - [Filters](#)
 - [Reports](#)
 - [Export data](#)
 - [Balance](#)
- [Change Password](#)
- [Logout](#)

Filter: (No filter selected)

The filter selected above (if any) will automatically be applied to any record list or report that you view. Click [here](#) to create a new filter.

Budget News & Messages

Important Links!

- [2013-2014 Salary Guidelines](#)
- [2013-2014 Human Resource Guidelines](#)
- [2013-2014 Fringe Calculator](#)
- [Budget App Documentation](#)

This year you can review last year's budget data. Any records from previous years are available as read-only.

Budget Year: FY - 2014

You have access to the following org/depts: [11/**]

Questions about the data or budget process should go to cathy-hagen@uiowa.edu or angela-mcmullin@uiowa.edu.

Please report any technical problems to [AIS Budget & Salary Planning Support](#).

SALARY PLANNING

This Salary Planning section includes forms to update budget and salary information by:

- Filled Positions
- Unfilled Positions
- General Expense/Revenue
- Working Budget

These will be discussed in detail later

MISCELLANEOUS

The options under miscellaneous include:

- Filters
- Reports
- Export data
- Balance

These will be discussed in detail later

CHANGE PASSWORD

This gives users the option of changing their Hawk ID.

LOGOUT

FILLED POSITIONS

ENTERING SALARY DATA

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

Name	SSN	EmpID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		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 **1** **2** **3** **4** **5** [FK Split](#) [Ent 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
Totals:										7,956	7,956	0	0	0.00		

[show increases/user fields](#)

There are multiple ways to enter new salary amounts. Actual salary dollars can be entered in multiple places or increases can be entered and the new salary will be calculated. Below are instructions on how to use these various methods.

- 1. New Position Salary:** Salary can be entered here and then allocated to MFKs by selecting the “Distribute” button. Also, salary can be input here and the “Set Position Salary” button selected (see 5.). The Set Position Salary option is used commonly when a position is owned by one area, but funded across many org-depts.
- 2. % Inc:** Enter the percent of increase (2% enter 2) and select “Distribute”. The increase will be added to the Current Salary.
- 3. \$ Inc:** Enter the dollar amount of the increase and select “Distribute”. The increase will be added to the Current Salary.
- 4. 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 MFKs to which the user has access.
- 5. Set Posn Sal (Set Position Salary):** This is a two-step process. The use of this button is optional but highly recommended with a shared position. It sets the New Position Salary in the top section of the screen before any distribution takes place. This will help determine what dollar amount each org is responsible for funding. The user must re-enter the salary again and then select the “Distribute” button. This button is not visible for General Service staff or for positions that a user does not own.

INCREASES AND USER FIELDS

To see Promotion and Other amounts and their codes, click on “show increases/user fields” underneath the MFK information. Although these fields are not required, they provide useful information to Human Resources at the end of the budget process. The application will only display MFKs to which the user has access rights. These amounts are updated directly in the cell.

- Promo:** Enter the dollar amount of the promotion. This is typically done after the New Position Salary, % Inc, or \$ Inc has already been entered. A code should be assigned to all promotion amounts.

FND	OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd	
050	11	1230	00000	000000000	5002	000	00000	10	0000	80,300	80,300	84,100	84,100	4.73	I	
											\$ Inc	Promo	Code	Other	Code (edit splits)	DEO
											1,300	2,500	D - Faculty - Assistant to Associate Professor, \$2500	0		N
											<div style="border: 1px solid black; padding: 2px;"> D - Faculty - Assistant to Associate Professor, \$2500 E - Faculty - Associate to Full Professor, \$3500 </div>					
											Totals: 80,300 80,300 84,100 84,100 4.73					
											<input type="button" value="Add MFK"/> <input type="button" value="Delete MFKs"/> <input type="button" value="Reload Record(s)"/> hide increases/user fields <input type="button" value="Save Record"/>					

- Other:** Enter the amount of other changes to salary. This is typically done after the New Position Salary, % Inc, or \$ Inc has already been entered. A code should be assigned to all amounts in the “Other” category. If *no salary increment was given*, users should use this drop-down menu to add the appropriate reason code.

FND	OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd	
050	12	2100	00000	000000000	5002	000	00000	10	0000	185,000	0	195,000	195,000	5.41	I	
											\$ Inc	Promo	Code	Other	Code (edit splits)	DEO
											7,000	0		3,000	4 - SEIU/Faculty - market adjst	N
											User Fields: <input type="text"/>					
											Totals: 185,000 0 195,000 195,000					
											<input type="button" value="Add MFK"/> <input type="button" value="Delete MFKs"/> <input type="button" value="Reload Record(s)"/> hide increases/user fields <input type="button" value="Save Record"/>					

- * - Multiple selection
- 3 - SEIU/Faculty - retention
- 4 - SEIU/Faculty - market adjst
- C - Chg in Faculty Admin Duties
- L - Lv of absence w/o sal
- N - New employee
- R - Phased retirement
- T - Term. next fiscal yr
- U - Term. this fiscal yr
- W - Lv of absence with sal
- Z - Disciplinary action

- User Fields:** User code fields are optional and can be used at the user’s 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 be given to HR or loaded to the General Ledger, but will be saved.

FND	OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd	
050	11	0000	00000	000000000	5002	000	00000	10	0000	100,000	100,000	110,000	110,000	10.00	I	
											\$ Inc	Promo	Code	Other	Code (edit splits)	DEO
											3,000	0		7,000	3 - SEIU/Faculty - retention	N
											User Fields: <input type="text"/> Retention agreement <input type="text"/> Professor <input type="text"/>					

- DEO:** Indicates if an individual is a Department Executive Officer. O is an Officer and N is not an officer.

OTHER INFORMATION

Merit (General Services) Positions: Merit salaries have been updated by Human Resources. Users cannot change the “New Pos \$” salary. Users may change, add, or delete MFKs by entering directly into the MFK line.

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

Name	SSN	EmplID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc		
			13-2280	1	35,872	36,722	2.37		
Posn Nbr	Posn Description	Job Cd	Pay G	Job Desc	Grp	Hrs	Cur Pos \$	New Pos \$	% Inc
00003363	CLERK III	CB12	08	Clk III	1	40	35,872	36,722	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		

[show increases/user fields](#)

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 the MFK salary to equal the New Position salary or this position will not balance. (if you believe the new position salary to be wrong, please contact HR on this)

Pay Basis 9: Information for these individuals are no longer in the application but can be found on the main screen under the heading “Important Links!” A link has been provided to the HR report “Complimentary Appointment Report”. Budget Officers may request that users review this report; however, it is not a requirement of the Budget Office.

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.

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

FND	OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Current Sal	Current Bud
050	05	0305	11000	50501800	5202	000	00000	60	0000	75,000	75,000
Total										75,000	75,000

Salary History

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

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

Year	Sal Amount	% Increase
2013	49,959	2.40 %
2012	48,788	2.95 %
2011	47,390	2.00 %
2010	46,461	0.00 %
2009	46,461	10.70 %

EXAMPLES

ONE POSITION / ONE OWNER / MULTIPLE FUNDING SOURCES

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

Name	SSN	EmpID	Owner	PCnt	Cur Epl \$	New Epl \$	% Inc
		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 Distribute 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	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	

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

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 - USER OWNS

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

Name: [] SSN: [] EmpID: 17-3260 Owner: [] PCnt: 1 Cur Epl \$: 140,000 New Epl \$: [] % Inc: -100.00

Posn Nbr: 00015439 Posn Description: Associate Professor(Clinical) Job Cd: FQ12 Pay G: [] Job Desc: Asc Pr(Cl) Grp: 1 Hrs: 40 Cur Pos \$: 140,000 New Pos \$: [] % Inc: -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	0.00			

[show increases/user fields](#)

All MFK distributions on this position will be viewable. Only the MFKs users 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 the users MFKs.

It is **highly recommended** that the Set Posn Sal button be used 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 MFKs which the user can update.

SHARED POSITION – USER DOES NOT OWN

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

Name: [] SSN: [] EmpID: 13-2410 Owner: [] PCnt: 1 Cur Epl \$: 74,000 New Epl \$: [] % Inc: -100.00

Posn Nbr: 00016577 Posn Description: Health Svcs Admin II Job Cd: PH08 Pay G: 12 Job Desc: Hlth Svc 2 Grp: 1 Hrs: 40 Cur Pos \$: 74,000 New Pos \$: [] % Inc: -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"/>	170	70	7280	08100	000000000	5202	000	000000	31	0000	14,816	14,816	0	0	0.00	I
<input type="checkbox"/>	993	13	2410	00130	000000000	5202	000	000000	00	0000	29,592	24,275	0	0	0.00	I
<input type="checkbox"/>	993	13	2410	00150	000000000	5202	000	000000	00	0000	29,592	24,276	0	0	0.00	I
Totals:									74,000	63,367	0	0	0.00			

[show increases/user fields](#)

This is exactly like the “Shared Position-User Owns” except the Set Posn Sal button will not be visible. Only the owner has the right to update New Position Salary using this button.

MULTIPLE POSITIONS

Budget - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media

Address http://web-farm3.its.uiowa.edu/budget/filled-positions.page

real Type search here Search Web Radio Music Games Sports News Movies HotStuff TV/Celebs

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

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

Name SSN EmplID Owner PCnt Cur Epl \$ New Epl \$ % Inc
 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 Assistan FR19 Grad Ra 1 1.0 1,032 0 -100.00

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

New Position Salary % Inc \$ Inc Distribute 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	17	3000	41000	72002800	5045	000	00000	10	0000	1,032	0	0	0	0.00	I
Totals:									1,032	0	0	0	0	0.00		

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

Budget - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Media

Address http://web-farm3.its.uiowa.edu/budget/filled-positions.page

real Type search here Search Web Radio Music Games Sports News Movies HotStuff TV/Celebs

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

Name SSN EmplID Owner PCnt Cur Epl \$ New Epl \$ % Inc
 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](#)

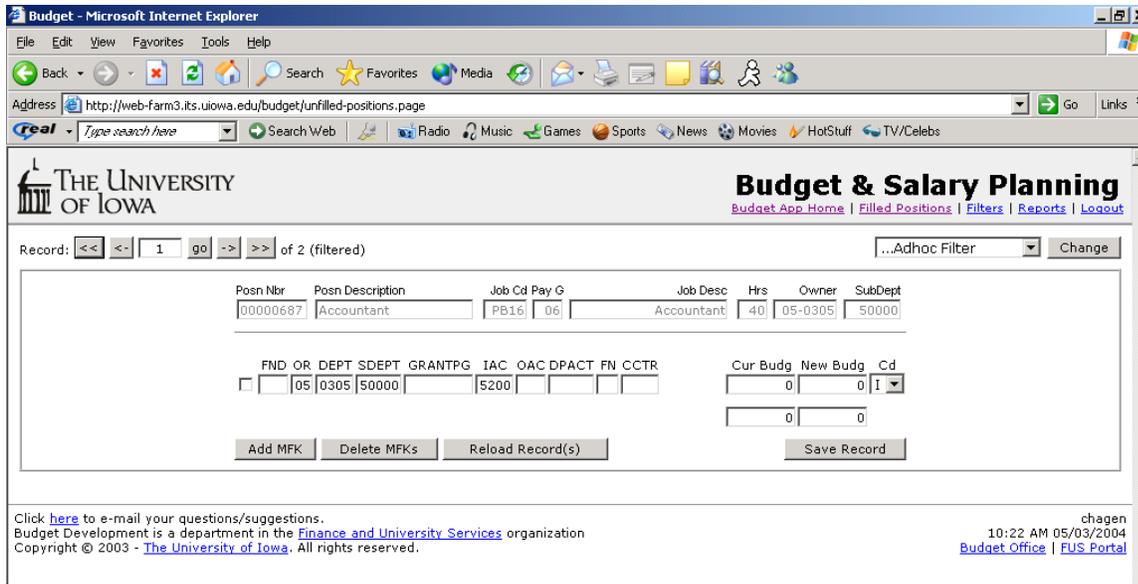
New Position Salary % Inc \$ Inc Distribute Set Posn Sal [Click here to distribute Reclass/Promo and Other amounts](#)

FND OR	DEPT	SDEPT	GRANTPG	IAC	OAC	DPACT	FN	CCTR	Cur Sal	Cur Bud	New Sal	New Bud	% Inc	Cd		
<input type="checkbox"/>	050	17	3000	41000	71886400	5610	000	00000	80	0000	19,968	0	0	0	0.00	I
Totals:									19,968	0	0	0	0	0.00		

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

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

UNFILLED POSITIONS



The application allows the user to assign an MFK and budget amount to an unfilled position. The MFK and the budget amount will go only 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 sent to Human Resources. If a user wants to change ownership of the position, proper paperwork must be submitted to the Human Resource Department through the Position Management application.

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

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

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

Assigning an MFK and budget amount is strictly for General Ledger and Budget Management purposes. Again, Human Resources will not collect any information on these positions.

GENERAL EXPENSE & REVENUE

Click [here](#) to export this data as a comma-delimited file or Excel spreadsheet

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

All General Expense and Revenue amounts are listed with Current Budget equal to New Budget. The user has the option to change the New Budget.

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

The user can click anywhere on the MFK to change it. Another popup screen will appear to enter changes.

Record: << < 1 go > >> of 57

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

Name/Desc: GENERAL EXPENSE

Cur Budget: 148134

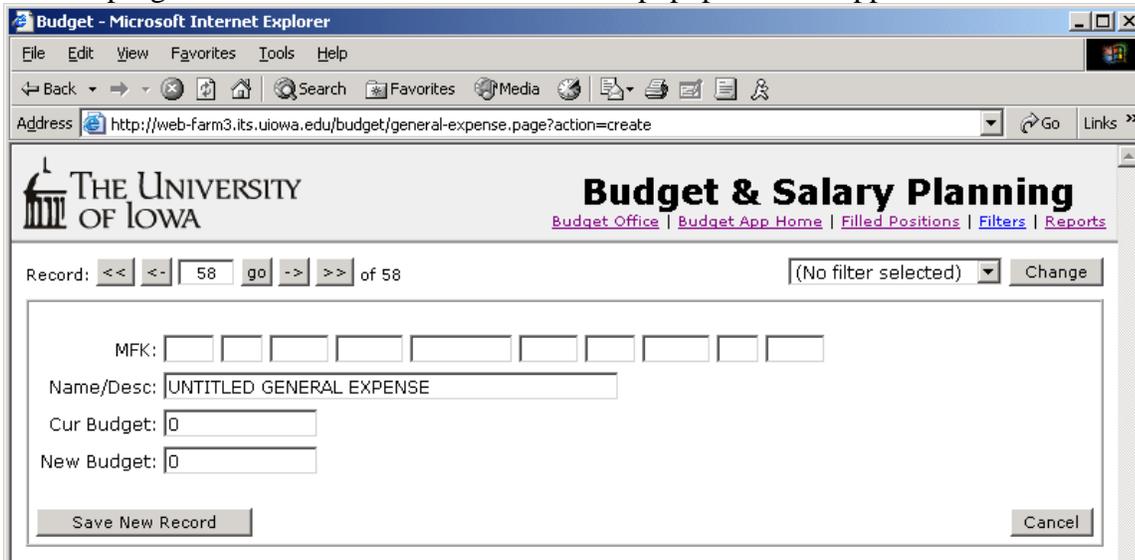
New Budget: 148134

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

GENERAL EXPENSE & REVENUE (continued)

Users must click on [General Expense & Revenue](#) on the home page in order to add new general expense or revenue lines. They cannot be added from the “Working Budget” link.

To create a new General Expense or Revenue line click “Click here to create new record” located in the top right-hand corner of the screen and this popup box will appear:



The screenshot shows a Microsoft Internet Explorer browser window displaying the 'Budget & Salary Planning' application. The address bar shows the URL: <http://web-farm3.its.uiowa.edu/budget/general-expense.page?action=create>. The page header includes the University of Iowa logo and the title 'Budget & Salary Planning'. Below the header, there are navigation links: 'Budget Office', 'Budget App Home', 'Filled Positions', 'Filters', and 'Reports'. The main content area shows a record list with 'Record: 58 of 58' and a '(No filter selected)' dropdown. Below this, there is a form for creating a new record with the following fields: 'MFK' (a grid of 10 empty boxes), 'Name/Desc:' (a text box containing 'UNTITLED GENERAL EXPENSE'), 'Cur Budget:' (a text box with '0'), and 'New Budget:' (a text box with '0'). At the bottom of the form are two buttons: 'Save New Record' and 'Cancel'.

When in the General Expense & Revenue screen, users may export data as a comma-delimited file or Excel spreadsheet. Select “Click here to export this data...” and additional instructions will be provided (see below).



The screenshot shows a browser window displaying the 'Export Budget Files' screen in the 'Budget & Salary Planning' application. The address bar shows the URL: <http://apps.its.uiowa.edu/budget/export.page>. The page header includes the University of Iowa logo and the title 'Budget & Salary Planning'. Below the header, there are navigation links: 'Budget App Home', 'Filled Positions', 'Filters', 'Reports', and 'Logout'. The main content area shows the 'Export Budget Files' section with a filter dropdown set to 'Adhoc Filter' and a 'Change' button. Below this, there is a paragraph of text: 'Click on one of the links below to download budget data in either comma-delimited format (suitable for Access), or as an Excel spreadsheet. Select a filter from your list above to reduce the data exported.' Below this text is a note: 'Windows 7 Users: ONLY use the "comma-delimited" export option! The "Excel" export option is not compatible with Windows 7.' At the bottom, there is a list of links: 'Filled Position Records (comma-delimited or Excel)', 'Unfilled Position Records (comma-delimited or Excel)', 'General Revenue & Expense Records (comma-delimited or Excel)', and 'Working Budget Records (comma-delimited or Excel)'.

Users also have the option to download other items such as Filled Position Records, Unfilled Position Records, and Working Budget Records from the above screen.

WORKING BUDGET

Budget & Salary Planning

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

[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

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

Users may add salary dollars to the General Ledger without a position number within the Working Budget display by selecting “Click here to create a new record” at the top of the page. This record will appear with an UP (unfilled position) 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 (F is Faculty, P is Professional & Scientific, etc.).

WORKING BUDGET (continued)

Users may also download the Working Budget as a comma-delimited or Excel file. See the excel file example below:

	A	B	C	D	E	F	G	H	I	J	K	L
1	BUDG_WB	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
19												
20												
21												
22												
23												
24												

This is an example of a comma-delimited file:

	A	B	C	D	E	F	G	H	I	J	K	L
1	BUDG_WB	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"
19												
20												
21												
22												
23												
24												

CATEGORY AND DEPARTMENTAL SHIFTS

In the past the Budget Office would do any category shift (change budget dollars from one classification to another) or departmental shift (moving dollars from one department to another) for you. An application has been created, at the bottom of your control sheet, the ability to move your own funds.

Reallocate Displayed 050 Funds

Enter an amount in only one of the rows. The second amount will be computed.

FROM Org: Dept: Sal Inst Acct: Sal Amount:
TO Org: Dept: Sal Inst Acct: Sal Amount:

Comment:

You will only be able to move funds you are responsible for. If you are doing a category shift, it will calculate the fringe dollars in the background and do the math for you to give you the correct salary amount. Fill in the known dollar you are trying to achieve with the correct Iacct.

If it is determined you did an entry in error, you will need to contact the Budget Office or the receiving Org/Department and they will reverse the entry for you.

A new report "Reallocated Funds" will help you keep track of any money movement you have done and to whom.

FILTERS

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

Quick Filter

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

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

The main content area is titled "Mode: Quick | Advanced". On the left, there are three filter categories: "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.

The main form area has a "Filter Name:" input field with "Save Filter" and "Delete Filter" buttons. Below this are several filter fields: "MFK:" with a row of checkboxes for FND, OR, DEPT, SDEPT, GRANTPG, IAC, OAC, DPACT, FN, and CCTR; "Owner:" with two input boxes; "Pay Group:" with one input box; "Job Code:" with one input box; and "Status Code:" with one input box.

At the bottom of the form are "Clear Filter", "Clear Fields", and "Apply Filter" buttons.

Once finished with the filter, go to the drop down menu at the top of the page and select "(No filter selected)" to go back to the original view.

The screenshot shows a web browser window titled "Budget - Microsoft Internet Explorer" with the address "http://web-farm3.its.uiowa.edu/budget/unfiled-positions.page". The page header is the same as the previous screenshot.

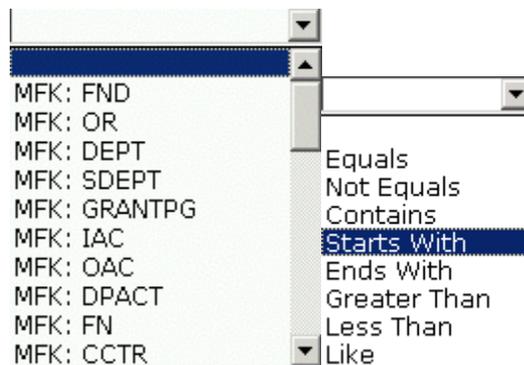
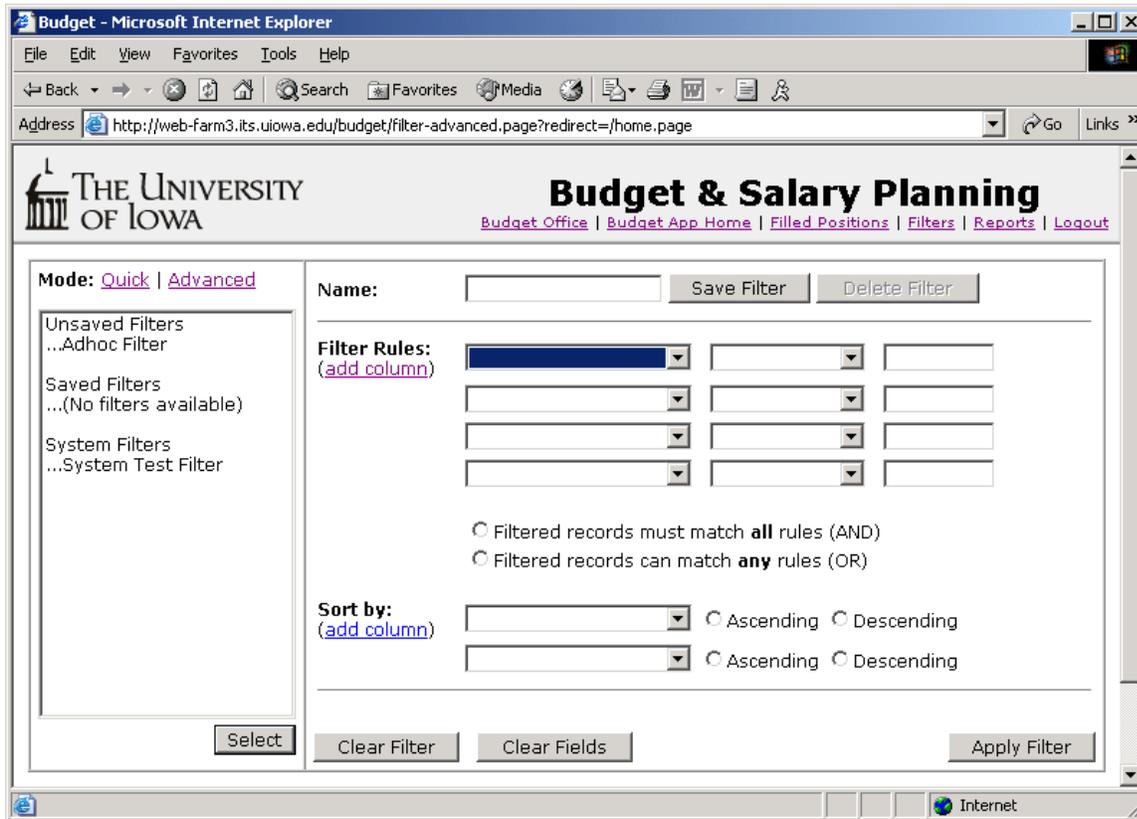
The main content area shows a record list. At the top, it says "Record: <<< << 1 go >> >>> of 1". Below this is a table with columns: "Posn Nbr", "Posn Description", "Job Cd", "Pay G", and "Job Desc". The first row contains: "00017741", "SECRETARY II", "GB51", "08", and "Secretary II".

Below the table is another set of filter fields: "FND OR DEPT SDEPT GRANTPG IAC OAC DPACT FN CCTR" with checkboxes and input boxes. Below these are "Add MFK" and "Delete MFKs" buttons.

A dropdown menu is open at the top right, showing options: "(No filter selected)", "(No filter selected)", "Unsaved Filters", "...Adhoc Filter", "Saved Filters", "... (No filters available)", and "System Filters", "...System Test Filter". A "Change" button is next to the dropdown.

At the bottom right of the form is a "Save Record" button.

Advanced Filter



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

Remember the filled position screen data is loaded by owner of the position first, then org-dept. This can be resorted using the filter screen. At the bottom of the filter screen, use the "Sort by" to change the settings.

BALANCE

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.

Budget & Salary Planning

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

Budget Group:

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

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

General Fund Groups:

General Fund groups must run the “**IACCT Control Sheet Balance**” report to confirm that category shifts were done correctly with the appropriate fringe percentage before you begin your balancing.

For General Fund groups, the “Balance Budget for Group” button will compare the Working Budget to the new fiscal year Base budget and plug any errors to the “Control Account” line. Users must verify that the Control Account line is all zeros. If it is not, they must go back to the working budget and adjust. Often excess dollars are put in an unfilled line. Once adjustments are made, recheck your “IACCT Control Sheet Balance” and return to the balance screen and rebalance.

This button will also run the report “New Position Salary!= Sum of MFKs (with owner)”. This verifies that the sum of the MFKs for filled positions equal the total new position salary. This is necessary in order for HR to receive the new salary information. Once this report is free from errors, return to the balance screen and rebalance.

Budget & Salary Planning

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

Budget Group:

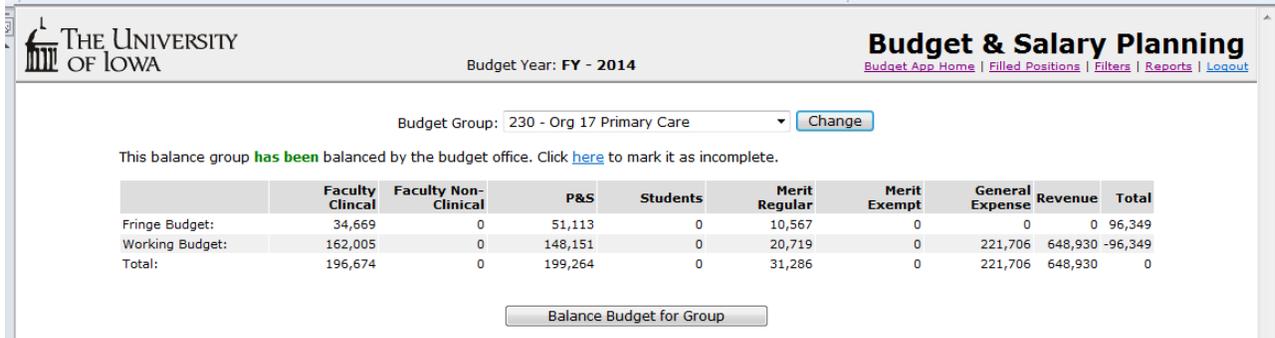
Balance Error: Some position total salaries do not equal the sum of the detail salaries. Click [here](#) to view the report.

	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

Non-General Fund Groups that will load to the General Ledger

These funds must also run the report “New Position Salary!= Sum of MFKs (with owner)” in order to verify that the sum of the MFKs for filled positions equal the total new position salary. This is necessary in order for HR to receive the new salary information.

Since these funds will be loaded to the General Ledger, they must balance to zero in the total column. The revenues and expenditures must zero out.



The screenshot shows the 'Budget & Salary Planning' interface for The University of Iowa. The budget year is FY - 2014. The selected budget group is '230 - Org 17 Primary Care'. A message indicates the group is balanced by the budget office. Below is a table with columns: Faculty Clinical, Faculty Non-Clinical, P&S, Students, Merit Regular, Merit Exempt, General Expense, Revenue, and Total. The rows are Fringe Budget, Working Budget, and Total. A 'Balance Budget for Group' button is at the bottom.

	Faculty Clinical	Faculty Non-Clinical	P&S	Students	Merit Regular	Merit Exempt	General Expense	Revenue	Total
Fringe Budget:	34,669	0	51,113	0	10,567	0	0	0	96,349
Working Budget:	162,005	0	148,151	0	20,719	0	221,706	648,930	-96,349
Total:	196,674	0	199,264	0	31,286	0	221,706	648,930	0

Funds not loaded to the General Ledger

These funds must also run the report “New Position Salary!= Sum of MFKs (with owner)” in order to verify that the sum of the MFKs for filled positions equal the total new position salary. This is necessary in order for HR to receive the new salary information.

REPORTS

There are numerous reports provided to help users with budget and salary planning. As mentioned in the Balance section, users must run the “New Position Salary != Sum of MFKs” report for all funds. In addition, General Fund groups must run the “IACCT Control Sheet Balance” report to confirm that category shifts were done correctly with the appropriate fringe percentage.

Budget Reports

- [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](#)
- [Compensation Category](#)
- [Department Budget Analysis \(old CI0004\)](#)
- [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](#) ←