

Budget Planner Tips & Tricks:

The following are a compilation of items meant to help you navigate through the Budget Planner system.

GENERAL INFORMATION: These apply to both Salary Planner and Budget Development.

- Chart of Accounts: always = **U**
- Budget ID: always = **BUD10** (is case-sensitive)
- Budget Phase: always = **WORK10** (is case-sensitive)

- **SAVE** on every page where you have input changes before navigating to the next page

We recommend that you begin your budget process with Salary Planner because index budgets for labor account codes are summarized based on labor distributions in Salary Planner.

SALARY PLANNER:

- Print Salary Planner Working Report first
 - Because you will have at your fingertips all pertinent information about employees/jobs in your organization.
 - Includes employees in other organizations that you are paying.
 - **Turn off pop up blockers.** You will not be able to pull or print up reports with it on.

- Mass Apply the average increase to each scenario ***before*** adjusting individual increases
 - Adjust 9 or 12 Month Faculty, Regular Staff, and each Bargaining Unit.

- After modifying an individual's labor distribution, hit the button at the bottom of the page that says, "Copy Job Distribution to Position".

- ALWAYS be aware of the self-service page you are editing. Look at the heading at the very top of the page. If you are modifying/editing a JOB salary, be sure you are on the EMPLOYEE DETAIL page or mass applying on the LIST by EMPLOYEE.

- NEVER modify the JOB DETAIL page.

- Labor distributions must always equal 100% and are to be reflected as they will be paid effective July 1st.

SAVE

SAVE

SAVE

After updating Salary Planner information, move to Budget Development

BUDGET DEVELOPMENT:

- **Print the Budget Development Working Report first**
 - This will help you see how your Salary Planner updates affect your budgets and what adjustments need to be made.
 - **Turn off pop up blockers.** You will not be able to pull or print reports with it on.

- NEVER budget dollars using account codes 1900 or 1903. These codes are reserved for actuals.

- Budget **ALL** unrestricted indices that will have fiscal year revenue or expense activity.

- POST equals SAVE in Budget Development.
 - The Calculate button will show you a preview of the changes you have requested, but it is not saved until you hit the POST button.

- **Indices must net to zero**

- Allocation account codes 16XX must net to zero by program at the institutional level. It is possible that 16XX will not zero out at a departmental or school/college level if allocations are made across Level 3 or Level 5 organizations.

- Use account code 80SA, "Salary Adjustments", when you are unable to budget against individual positions. (Ex: need to budget overtime, but it is unknown at this time which individual will be working the overtime during the year, OR need to budget for expected faculty hire, but are unable to obtain position number in time to budget).

- ALWAYS add account code comments when utilizing **account codes 80SA, 80E0, and transfer account codes 11XX and 12XX.** The comments for transfers should indicate which index the money is coming from or too.

- Make sure when budgeting transfer account codes **11XX and 12XX, or allocation account codes 16XX,** that the corresponding offset Unrestricted or Agency index is budgeted as well.

- Use Budget Development REPORTS provided.

- Budget Development Working Report includes 1901 (Budgeted Use of Balance). Operating Budget Summary and Organization Summary Reports do not.

- **LOCK your organizations before you run the index out of balance report. The index out of balance report will be the last report you run. You are not finished with Budget Development until all indices are in balance.**