

Budget Construction Training

This document enumerates the parts of the Budget Construction (BC) application that were retooled to interface with the HRMS 8.0 Implementation of Peoplesoft (PS).

Overview

BC uses the position as a means to identify a collection of work related tasks specific to an organization. From the BC perspective, positions can be filled, vacant, not funded, active, deleted and frozen.

BC contains functionality allowing the user to add, update and delete funding to/for/from positions. Positions can be filled, vacant or not funded. Funding adjustments to a filled position is also known as setting the salary.

*University Id is the same as Empl Id.

*If you are only setting salaries in Budget Construction, (ie, entering new compensation rate, distributing percent (standard hours) and salary between accounts for a person currently appointed to a position), you do not have to do any corresponding e-docs in PeopleSoft.

*When setting salaries, please budget dollars to equal percent and visa versa.

Historically, BC allowed the user to directly update some of the attributes of the position within the BC document (ie, effective months, pay months and FTE). **This functionality is removed. Users will use the new Maintain Position e-doc to make changes and after final approval, BC will copy the changes overnight or on demand (ie, refresh features).**

*If you wish to change the attributes of a position in any way, you must do a Maintain Position e-doc. Additional e-docs may be required to update the job (appointment) of an incumbent so there is a link between the position and the job (appointment). The appropriate e-doc required depends on the situation. For example, a position is reclassified from bi-weekly to monthly. Once the Maintain Position e-doc is approved and entered into PS, a Promote e-doc must be processed for the incumbent.

*If you wish to add a future hire to an existing position in BC, you must initiate a Hire e-doc. Please use effective dates of 7/1/03 for 12-month appointments and 8/1/03 for 10-month appointments. The Hire e-doc must be approved and entered into PS before the incumbent can be added to BC. For those future hires in which their appointment dates are different than 7/1/03 or 8/1/03, please budget the position as VACANT or budget the dollars needed in the salary reserve lines.

*If you want to change a position from 12 to 10 months, a Maintain Position e-doc must be initiated. To change the pay months, use the drop down option in the

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Work Period field and update. Use an effective date of 7/1/03. Be sure that the Update Incumbent box is checked.

*To transfer an individual that is currently a 12 month appointment to a position that is currently 10 months, a Transfer e-doc is needed. Use an effective date of 7/1/03 instead of 8/1/03. Why? PS does not have stop dates. If you appoint the person effective 8/1/03, they would continue to be paid for July.

Budgeting by Organization

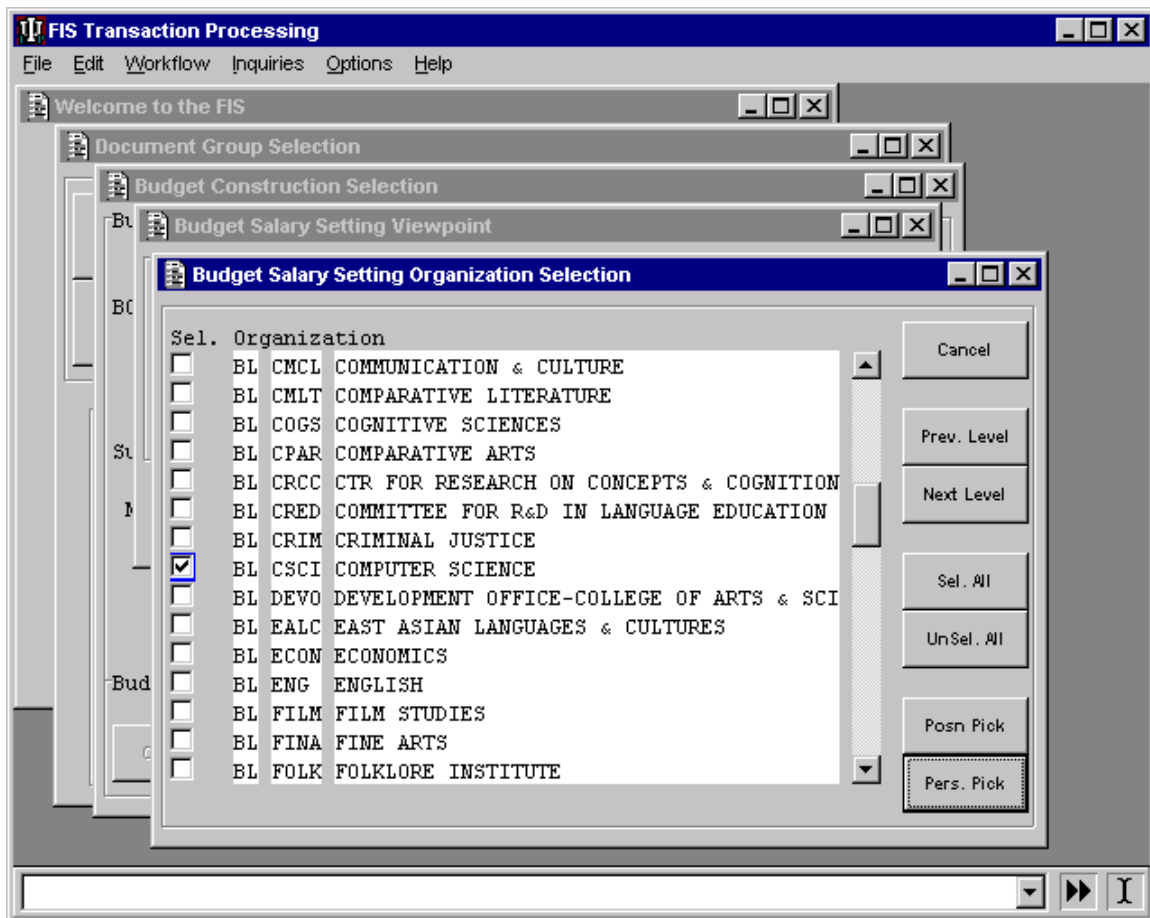


Figure 1-

This is the organization drill down environment. It is built based on the BC organization reports to and review hierarchy tables. The user must be a BC document approver for the set of organizations in which she wants to set salaries.

You can drill up or down in the organization hierarchy using the Prev Level and Next Level buttons.

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Once you reach the intended Org level, you may set salaries by using the Posn Pick (Position) or Pers Pick (Person) buttons located on the lower right hand side of the screen.

Organization Budgeted Position- Historical BC Screen

Scope Adjustment Criteria

Position: Search

Posn Type:

Posn Title: Clear

Resp. Coa/Org:

Job Campus/Rank:

Incumbent Name: (or Funding Status)

Note: Funding Status can be VACANT, NOT FUNDED or DELETED POS.

Search Results

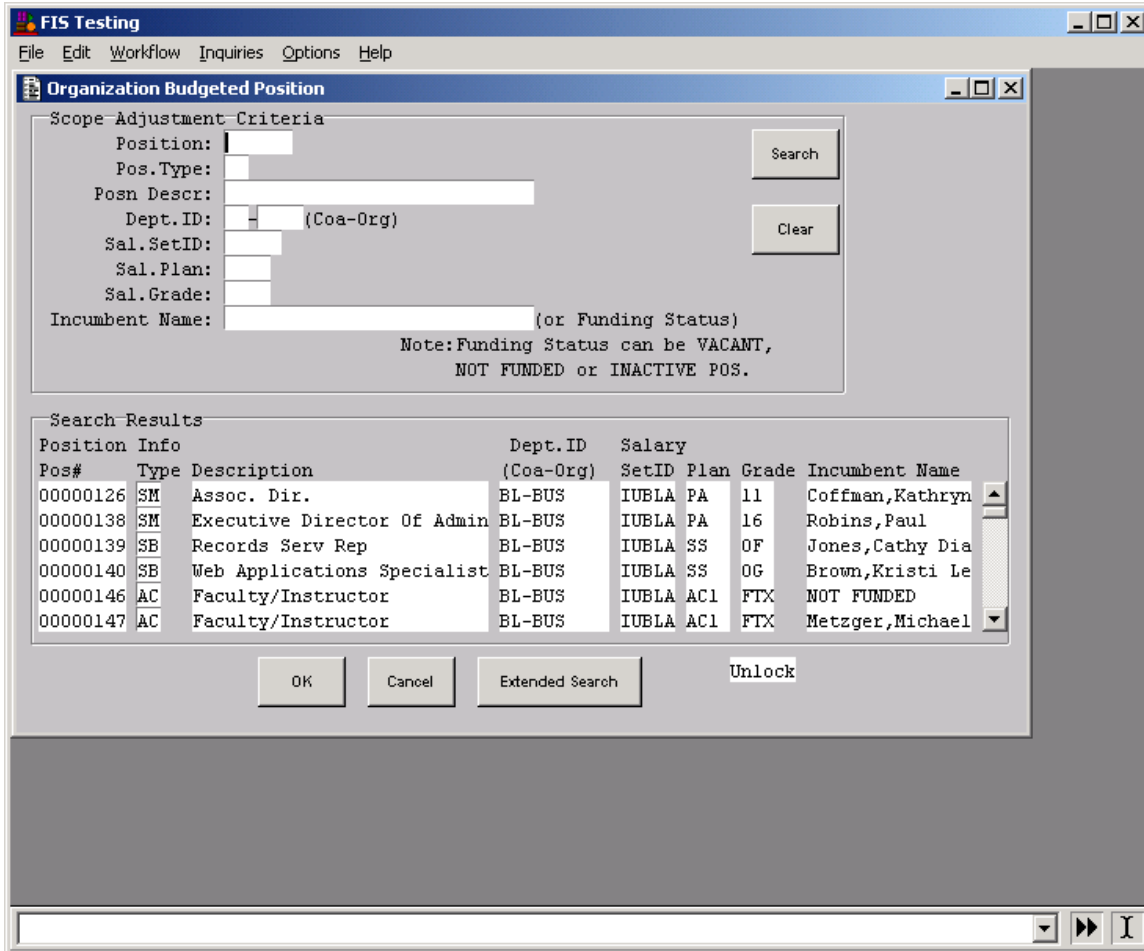
Position Info			Resp.		Job Info		
Pos#	Type	Title	Coa/Org.	Campus	Rank	Incumbent Name	
01000T	SM	SR. HARDWARE ENGR.	BL CSCI	BL	PA12	HESS, CALEB M	
01018P	SM	ADMIN. ASST.	BL CSCI	BL	PA12	MCCLOSKEY, LINDA	
0101DJ	AC	FACULTY/INSTRUCTOR	BL CSCI	BL	IROX	DYBVG, R KENT	
0101UP	SM	HARDWARE ENGINEER	BL CSCI	BL	PA09	STAILEY, KURT A	
0101XG	SB	OFC SERVICES ASST	BL CSCI	BL	SS0D	BATTERSBY, LUCY	
0102IW	SM	COMPUTER ENGINEERING	BL CSCI	BL	PA14	HIMEBAUGH, BRYCE	

OK Cancel Extended Search Unlock

Figure 2 – Historical Budget Construction Screen

See Example A for changes to this screen.

Example A- New Screen



Organization Budgeted Position-

This is the new BC screen with PS analogs added. Only currently active positions marked as budgeted or positions currently associated with an incumbent, that are associated with the selected FIS organization(s), are displayed (See Appendix A for the definition of Active Position).

This screen is accessed from the Budget Salary Settings Organization Selection screen using the Posn. Pick button. When performing a search by org., results will include those positions associated with sub-tree orgs. Double clicking on the position number will then bring up the BC Salary Setting by Position screen that can be updated with salary information (See Example C).

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Budget Position Lookup (extended search) – Historical BC Screen

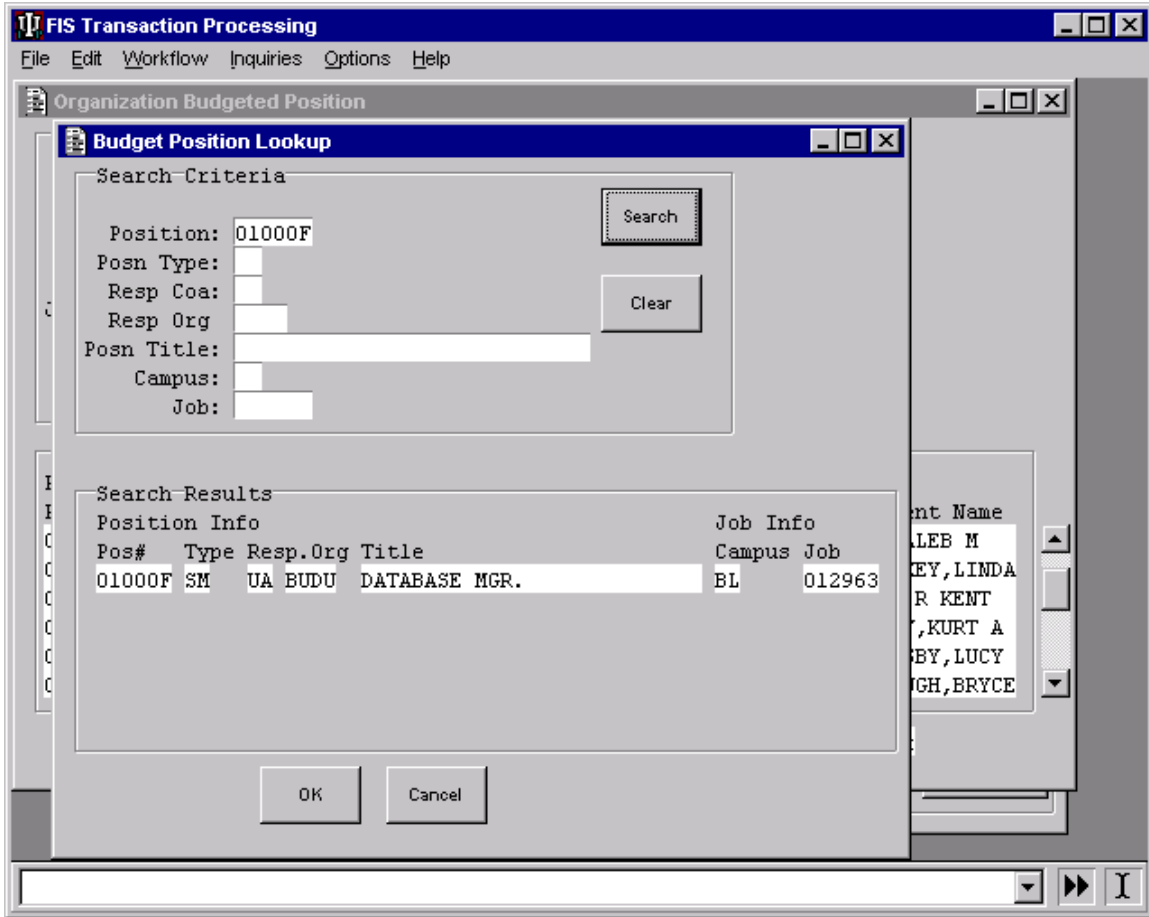
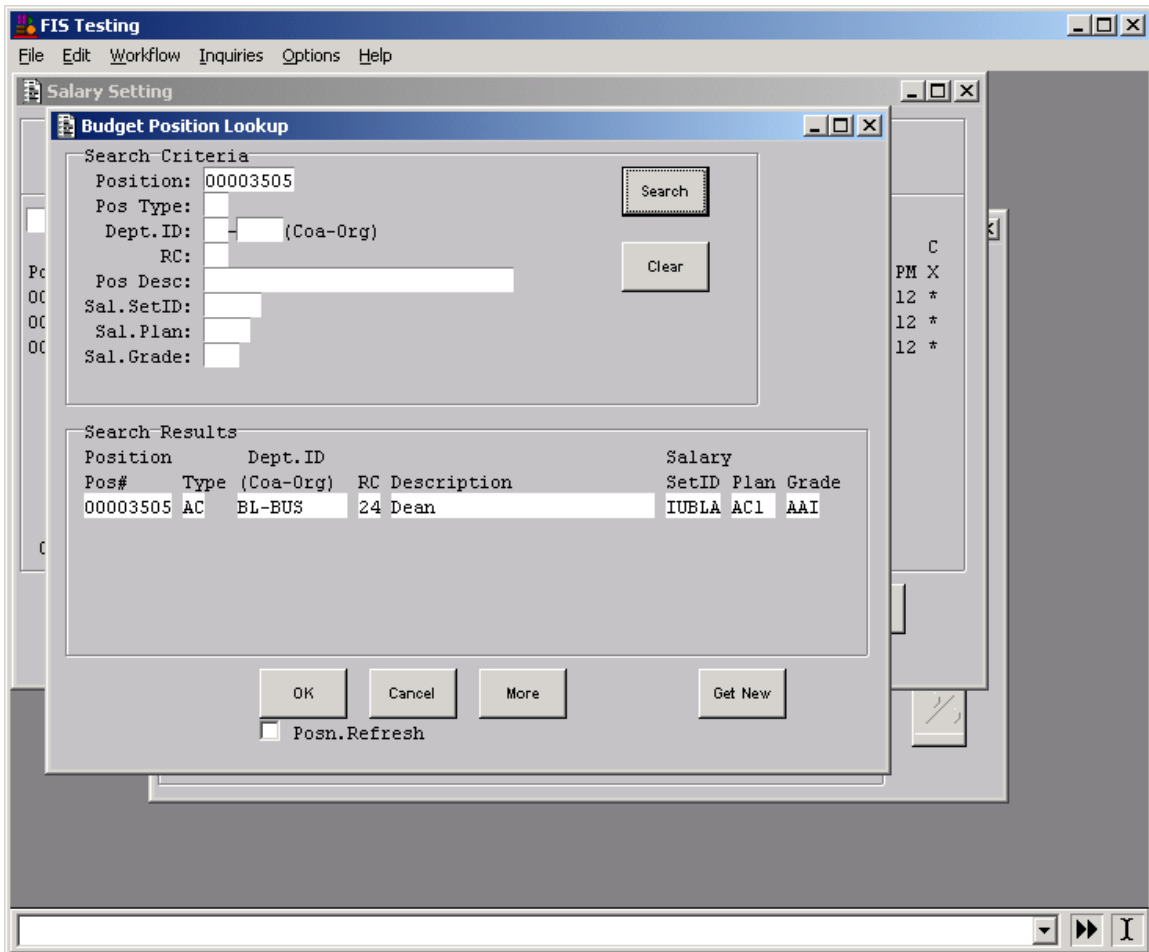


Figure 3 – Historical Budget Construction Screen

See Example B for changes to this screen.

Example B – New Screen



Budget Position Lookup –

All the fields on the screen shown in Figure 3 have been replaced with PS analogs. Only currently active positions marked as budgeted are displayed (See Appendix A for the definition of Active Position).

The GET NEW button has been added to this screen to enable users to dynamically add newly approved positions as of the nightly refresh in PS to the BC position table. (See Example F). Once the user selects the new position to add from PS, the Salary Setting by Position screen is displayed (Example C).

- **Get New Button-** you will get a warning that you should not be using this button unless you are positive that a position has been entered into PS since

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the nightly refresh. Please contact your Campus Budget Office before using. If used, a listing will appear that reflects all newly approved positions in PS.

- **Position Refresh-** if you have made a change to an existing position (such as pay months) and it has been entered “as of today” into PS (after the nightly refresh) you can check this box and the changes made to the position in PS should update in BC. Just like the GET NEW button, this feature should only be used in emergencies. If you are able to wait for the nightly refresh, please do.

Salary Setting by Position – Historical BC Screen

Position
Fy/Pos#: 2003 0101DJ FACULTY/INSTRUCTOR Resp Coa/Org: BL CSCI FTE: 1.00
Campus/Job: BL LG0020 Rank: IROX Pay Mos: 10-MO Eff: 10 Pay Prd: 10 100%

Funding

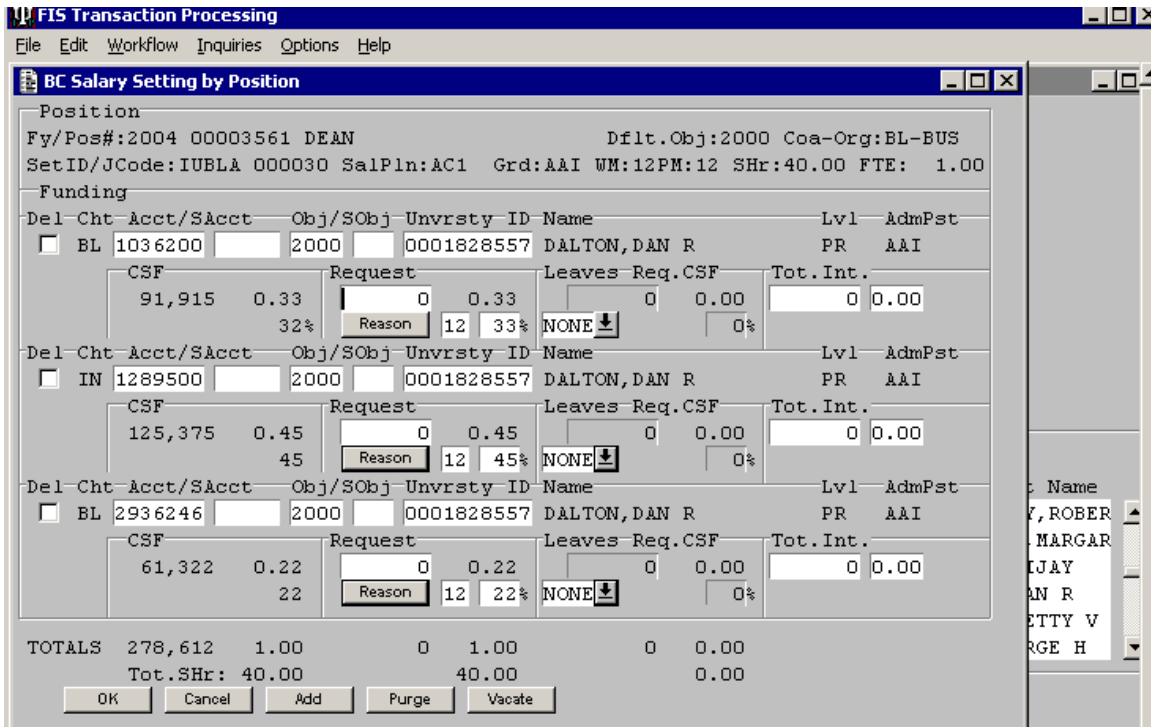
Del	Cht	Acct/SAcct	Obj/SObj	SSN	Name	Rank
<input type="checkbox"/>	BL	1029700	2000		DYBVIG, R KENT	IRO1
		CSF	Request	Leaves	Req. CSF	Tot. Int.
		98,400	1.00	0	1.00	0 0.00
		100%	Reason	10	100%	NONE 0%
Del	Cht	Acct/SAcct	Obj/SObj	SSN	Name	
		CSF	Request	Leaves	Req. CSF	Tot. Int.
Del	Cht	Acct/SAcct	Obj/SObj	SSN	Name	
		CSF	Request	Leaves	Req. CSF	Tot. Int.
TOTALS		98,400	1.00	0	1.00	0 0.00

Buttons: OK, Cancel, Add, Purge, Vacate

Figure 4 – Historical Budget Construction Screen

See Example C for changes.

Example C – New Screen



BC Salary Setting by Position –

The information that appears in the header of this screen is updated with the attributes associated with the position. If you wish to change any of these fields, you must process a Maintain Position e-doc. Within the Maintain Position e-doc, be sure that the Update Incumbents? field is checked if the position is filled. Once the e-doc is approved and entered into PS, the changes will be reflected in BC after the nightly refresh.

A new button labeled Re-calc might appear on this screen. If it does, it means some of the information between PS and BC is out of sync. Click the button and then verify the updated data as correct.

Note- you can also run a report daily to reflect any synchronization problems in BC. (See Appendix B)

Double clicking on a blank University Id field displays the Active Jobs by Position screen. (See Example G1).

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Position Budget Code (Pay Months) Inquiry – Historical BC Screen

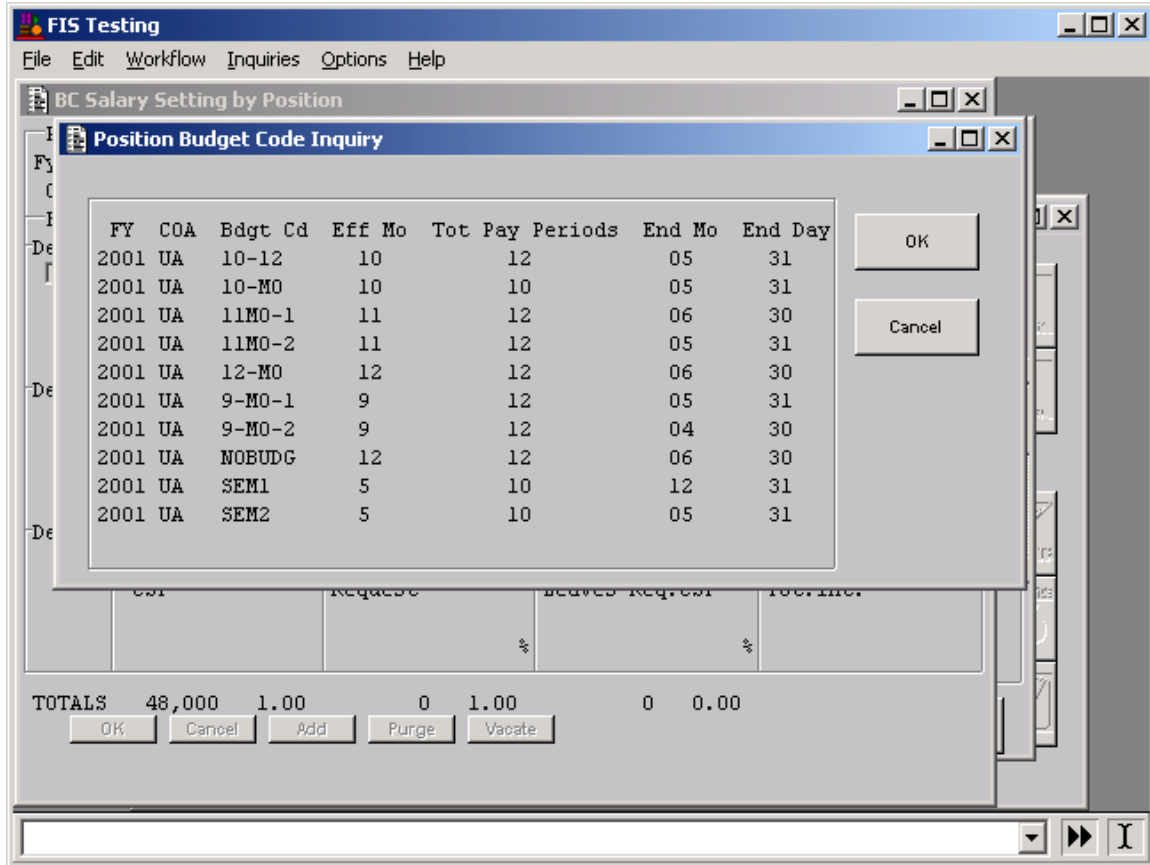


Figure 5- Historical Budget Construction Screen

This screen has been removed since changes to the position will no longer be allowed from inside BC.

Organization Budgeted Incumbent – Historical BC Screen

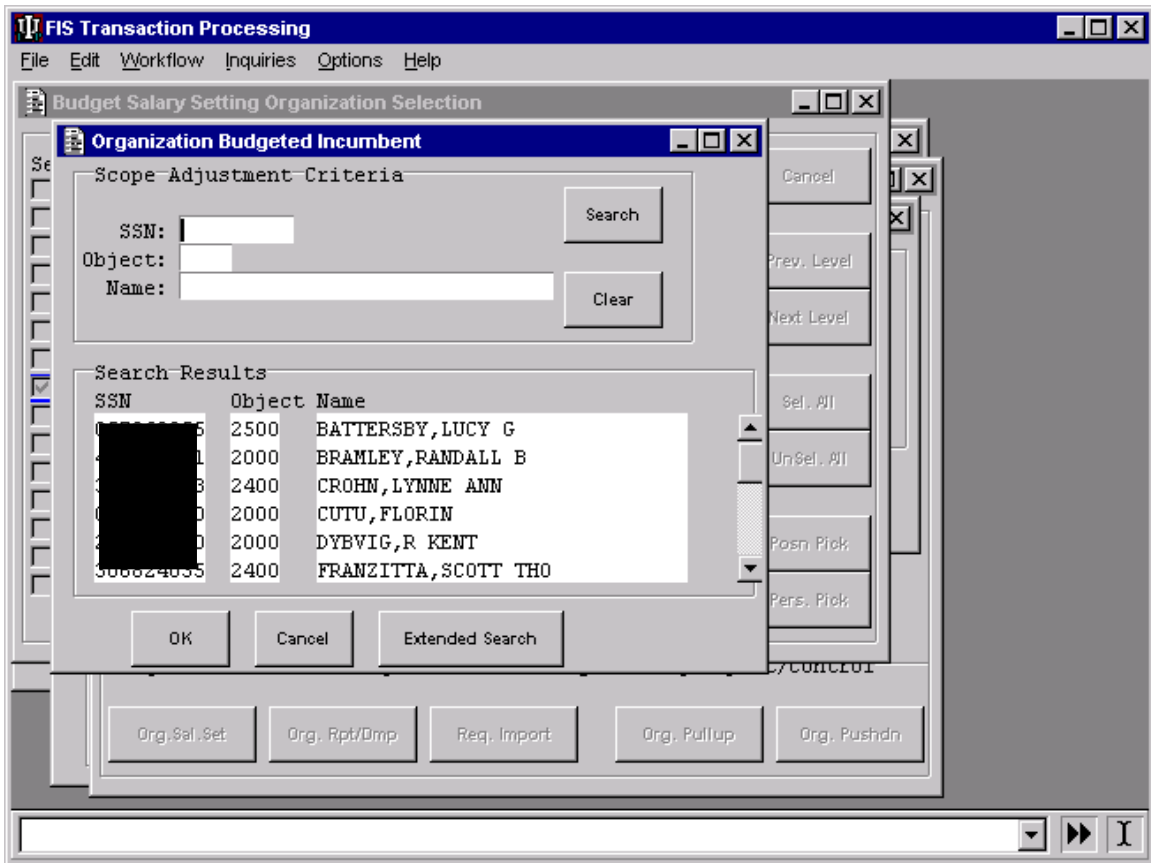
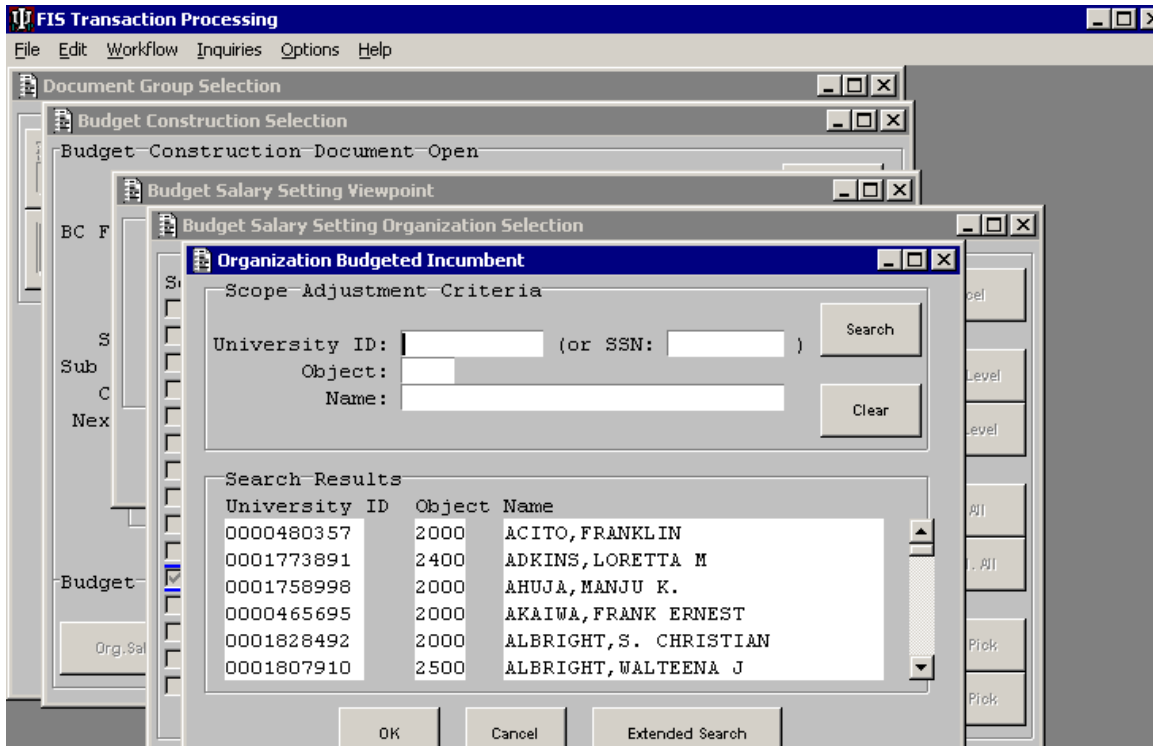


Figure 6 – Historical Budget Construction Screen

See Example D for changes to this screen.

Example D – New Screen



Organization Budgeted Incumbent –

This screen is accessed from the Budget Salary Setting Organization Selection screen using the Pers. Pick button.

The field labeled SSN has been replaced with University ID. The Extended Search button will display a lookup dialog box allowing the user to search the new BC intended incumbent table directly.

Double clicking on the University Id will bring up the BC Salary Setting by Incumbent screen (See Example H).

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Intended Incumbent Lookup – Historical BC Screen

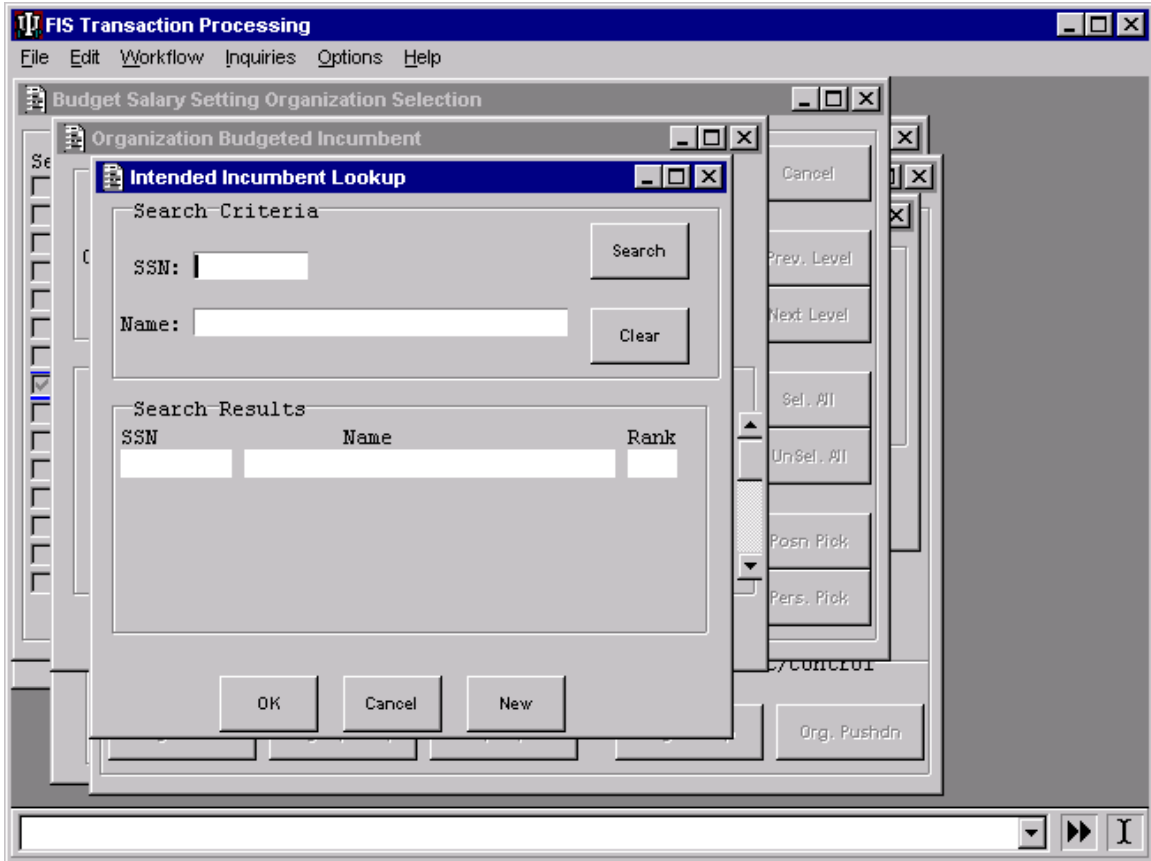
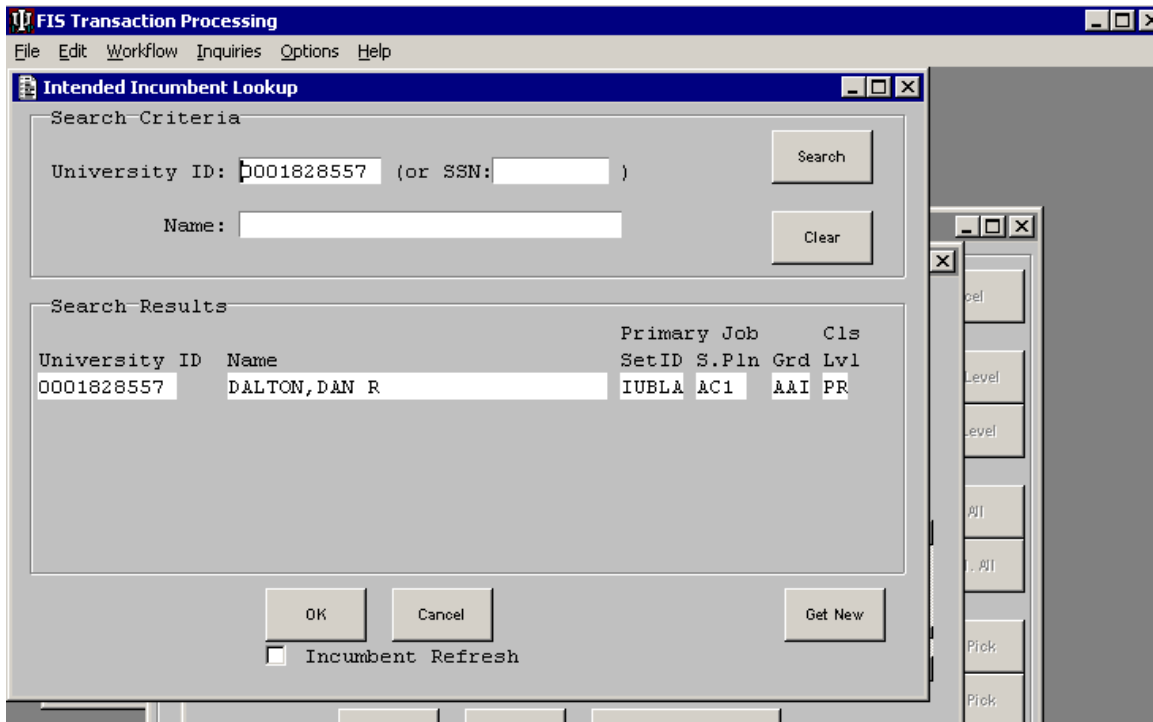


Figure 7 – Historical Budget Construction Screen

See Example E for changes to this screen.

Example E – New Screen



Intended Incumbent Lookup-

This screen is accessed from the Salary Setting screen using the Add Incumbent button, or accessed from the Organization Budgeted Incumbent screen using the Extended Search button.

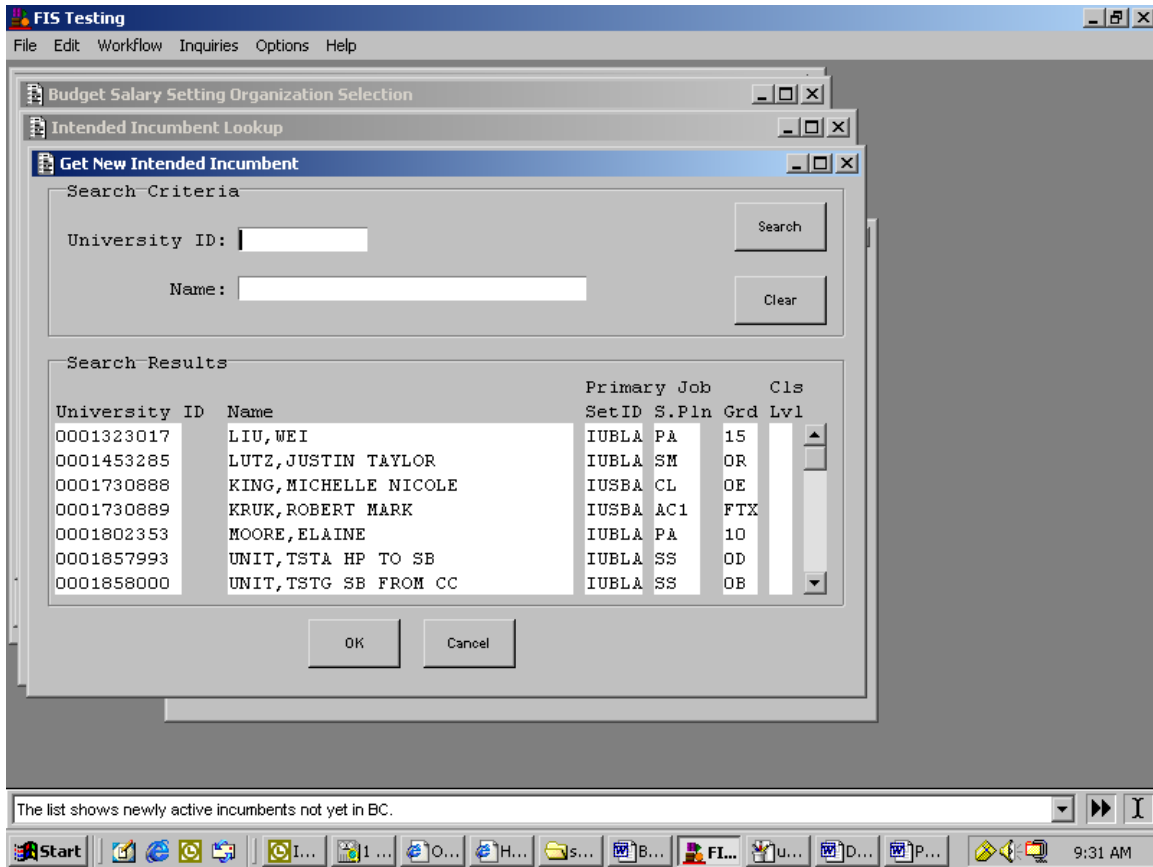
All fields have been replaced with PS analogs from the PS personal data table. The SSN field has been replaced with University Id.

The Employee Proposed Rank (Rank) has been replaced with the Salary Admin Plan and Grade for the Valid Appointment record where the Job Indicator field is set to (P)rimary. Salary Admin Plan and Grade. The IU classification level will also be displayed for faculty. The fields will be updated nightly.

The button labeled “New” has been replaced with the button, “Get New” which displays a search dialog box for the PS personal data table (See Example F). This enables the user to add newly approved incumbents as of the nightly refresh from PS into BC. You will receive a warning that you should only be using this feature if you are positive that an entry was made into PS. Please contact your Campus Budget Office before using. Once the user selects the incumbent they wish to add to BC from the PS tables, the Salary Setting by Incumbent screen is displayed (See Example H).

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Example F – New Screen



Get New Intended Incumbent-

Reflects those records updated in PS since the nightly refresh, which are not in BC. This feature should only be used when obtaining permission from your Campus Budget Office.

New Intended Incumbent – Historical BC Screen

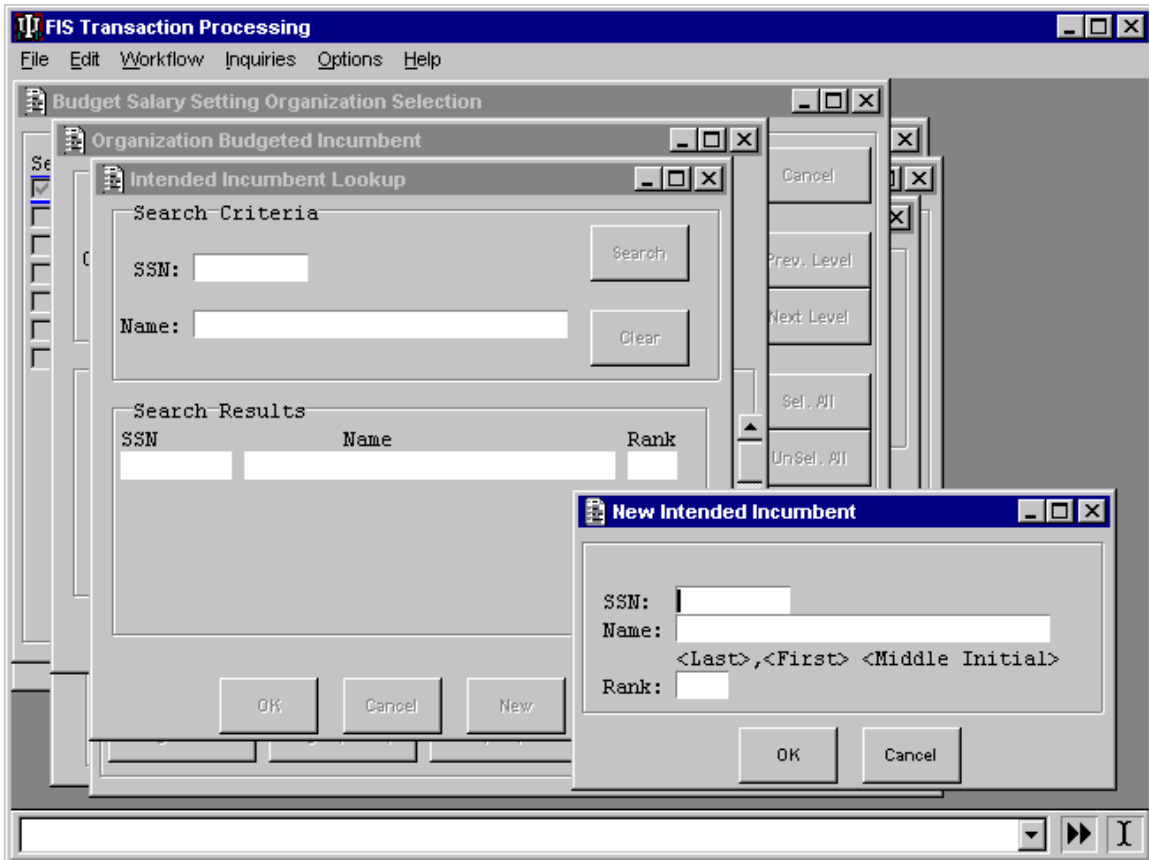
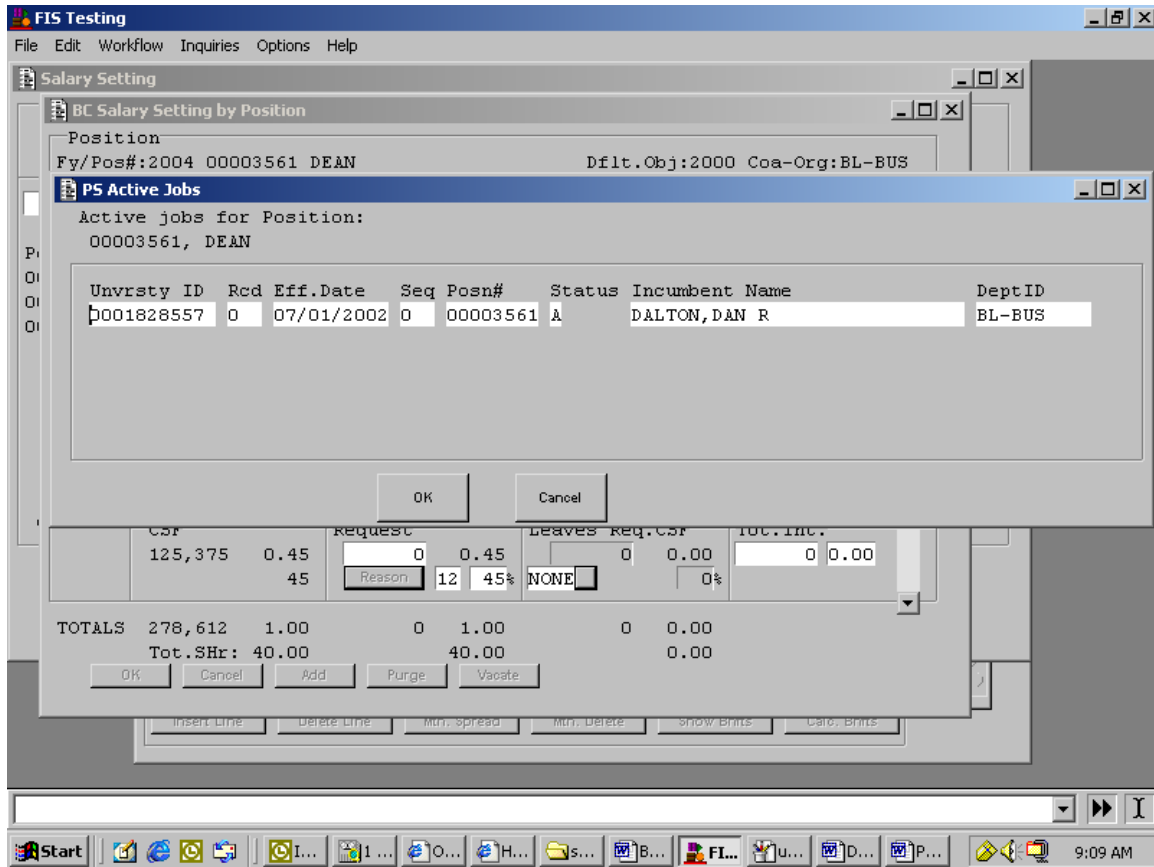


Figure 8 – Historical Budget Construction Screen

This screen was replaced by the Get New feature. See Example F for changes to this screen.

Example G1- New Screen

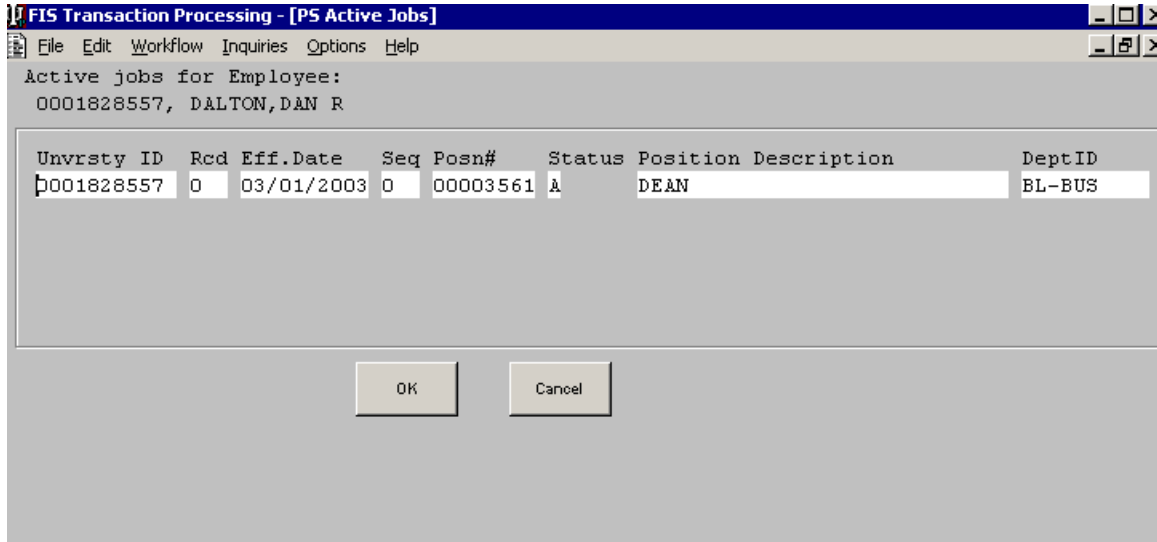


PS Active Jobs (Active Jobs by Position)-

While you are in BC Salary Setting by Position screen, if you add a line and double click on the blank University Id; you will get this screen that reflects the incumbents linked to that specific position.

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Example G2 – New Screen



PS Active Jobs (Active Jobs for Employee) –

While you are in the BC Salary Setting by Incumbent screen, if you add a line and double click on the blank position field; you will get this screen which reflects the positions linked to the incumbent.

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BC Salary Setting by Incumbent – Historical BC Screen

FIS Transaction Processing
File Edit Workflow Inquiries Options Help

BC Salary Setting by Incumbent

Incumbent
SSN: [REDACTED] Name: DYBVIG,R KENT Rank: IR01

Funding

Del-Cht	Acct/Sacct	Obj/SObj	Posn	Pos.Title	Pos.Rank	EM/PM	Pos.FTE
<input type="checkbox"/> BL	1029700	2000	0101DJ	FACULTY/IN IROX	10/10		1.00
CSF		Request	Leaves	Req. CSF	Tot. Int.		
98,400		1.00	0	1.00	0	0.00	0 0.00
100%		Reason	10	100%	NONE	0%	

TOTALS 98,400 1.00 0 1.00 0 0.00

OK Cancel Add Purge

Figure 9 – Historical Budget Construction Screen

See Example H for changes to this screen.

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Example H – New Screen

FIS Transaction Processing - [BC Salary Setting by Incumbent]

Incumbent
University ID: 0001828557 Name: DALTON, DAN R Class.Lvl: PR

Funding

Del	Cht	Acct/SAcct	Obj/SObj	Posn#	Pos. Descr	SPln	Grd	WM/PM	Ps.FTE	AdmPst
<input type="checkbox"/>	BL	1036200		2000	00003561	DEAN	AC1	AAI 12/12	1.00	AAI
		CSF	Request	Leaves	Req.	CSF	Tot. Int.			
		91,915	0.33	0	0.33	0	0.00	0	0.00	
		32%	Reason	12	33%	NONE	0%			
<input type="checkbox"/>	IN	1289500		2000	00003561	DEAN	AC1	AAI 12/12	1.00	AAI
		CSF	Request	Leaves	Req.	CSF	Tot. Int.			
		125,375	0.45	0	0.45	0	0.00	0	0.00	
		45	Reason	12	45%	NONE	0%			
<input type="checkbox"/>	BL	2936246		2000	00003561	DEAN	AC1	AAI 12/12	1.00	AAI
		CSF	Request	Leaves	Req.	CSF	Tot. Int.			
		61,322	0.22	0	0.22	0	0.00	0	0.00	
		22	Reason	12	22%	NONE	0%			
TOTALS		278,612	1.00	0	1.00	0	0.00	0	0.00	
		40.00			40.00				0.00	

OK Cancel Add Purge

BC Salary Setting by Incumbent –

The Employee Proposed Rank Code has been replaced with Salary Admin Plan and Grade associated with the incumbent's primary job record and cannot be changed inside of BC. A Maintain Position e-doc with an appropriate Reason Code is required to make those changes. The changes must be approved and entered into PS before the updates will be reflected in BC.

Double clicking on a blank position number field will display the Active Jobs by Employee (Example G2).

Positions that have an (I)nactive effective status cannot be used in BC. Inactive positions by definition do not have any valid appointments. Inactive positions can have position status codes of (D)eleted, Temporarily (I)nactive and F(R)ozen.

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FIS Position Inquiry – Historical FIS Screen

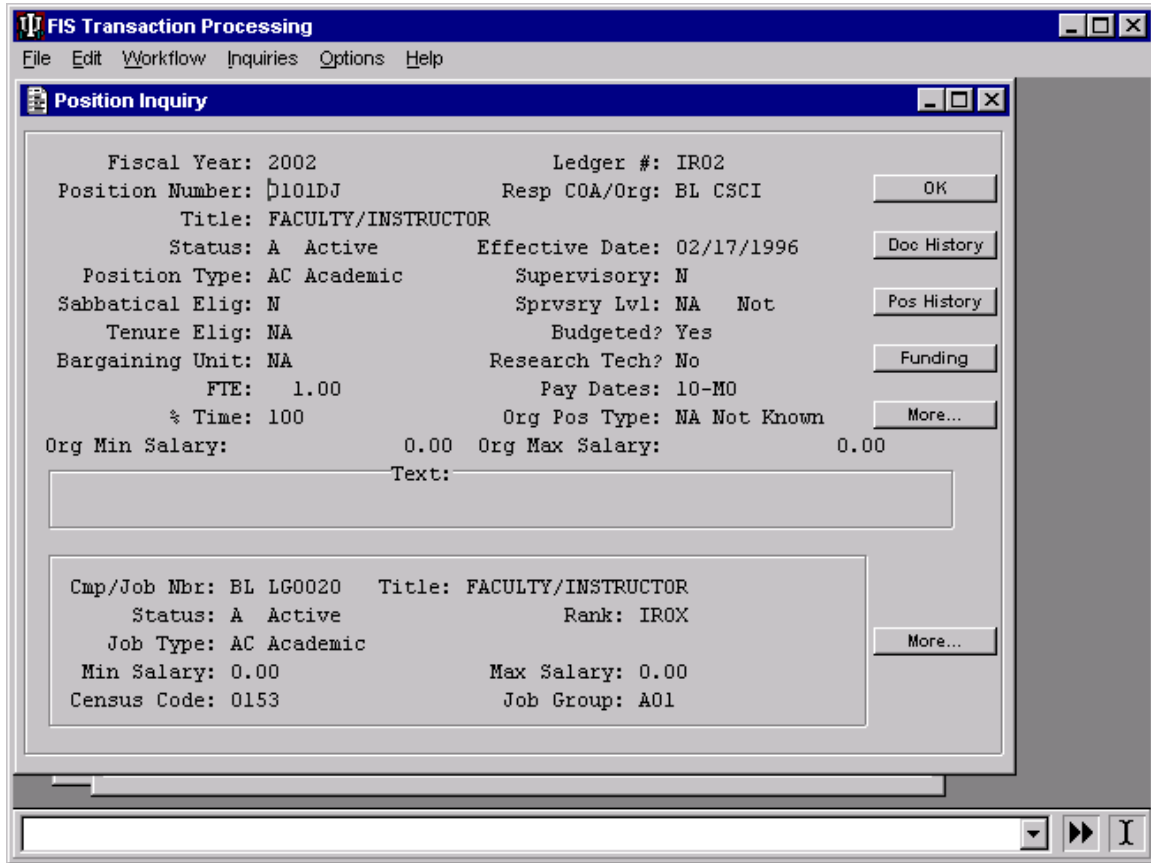
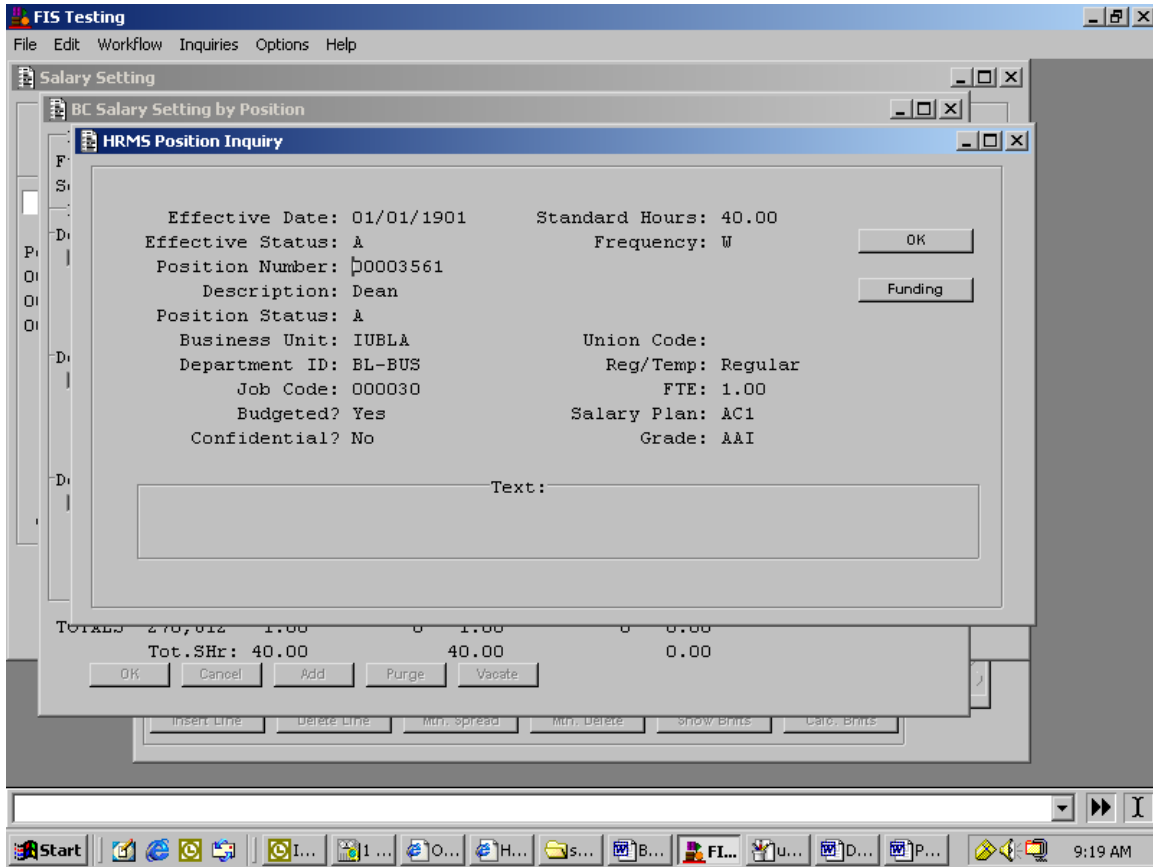


Figure 10 – Historic FIS Position Inquiry Screen

See Example I for changes to this screen.

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Example I – New Screen



HRMS Position Inquiry Screen-

Double click on the position number in BC and it will bring up this screen. Pressing the Funding button will give you incumbent information.

Budgeting by Account

Salary Setting – Historical BC Screen

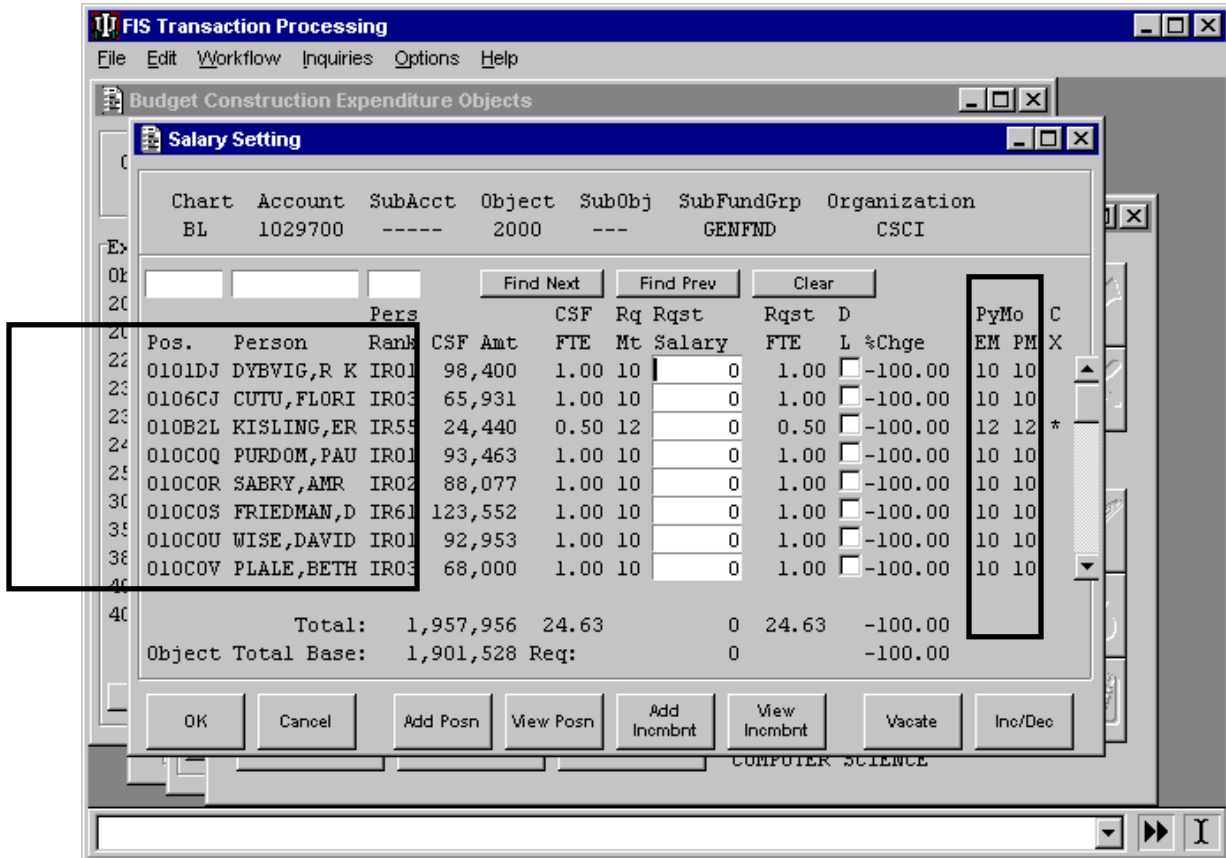


Figure 11 – Historical Budget Construction Screen

See Example J for changes to this screen.

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Example J – New Screen

Chart	Account	SubAcct	Object	SubObj	SubFundGrp	Organization
BL	1036200	-----	2000	---	GENFND	BUS

Pos.Nbr	Name	Cls	CSF	Amt	FTE	Mt	Salary	Rq	Rqst	FTE	L	%Chge	SPIn	Grd	WM	PM	X
00003561	DALTON, DAN	PR		91,915	0.33	12		0	0.33		<input type="checkbox"/>	-100.0	AC1	AAI	12	12	*
00003914	HILL, JOHN	PR		149,226	0.77	12		0	0.77		<input type="checkbox"/>	-100.0	AC1	AAJ	12	12	*
00004415	JAFFEE, BRU	PR		107,094	0.65	12		0	0.65		<input type="checkbox"/>	-100.0	AC1	AAJ	12	12	*

Total:			348,235	1.75			0	1.75	-100.00								
Object Total Base:			348,225	Req:			0		-100.00								

Buttons: OK, Cancel, Add Posn, View Posn, Add Incmbnt, View Incmbnt, Vacate, Inc/Dec

Checkboxes: Posn. Ref., Incumbent Ref.

Salary Setting –

The fields outlined in Figure 11 have been changed to PS analogs.

The Employee Proposed Rank Code has been replaced with the Grade from the associated position. Non-vacant funding lines for faculty will also show the `iu_classif_level` value. All other lines will display null in the `iu_classif_level` field.

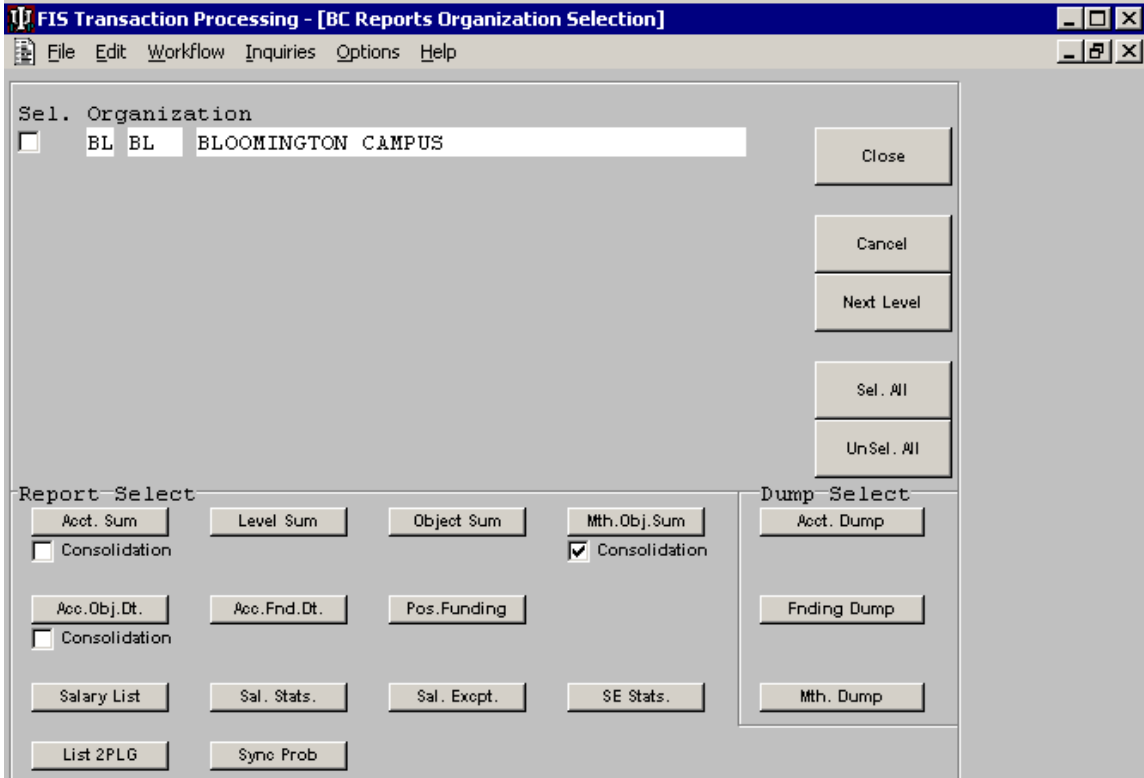
Note- Posn. Ref. and Incumbent Ref. buttons. You will receive a warning message telling you to only continue if you are positive that the PS record has been entered in the system after the nightly refresh. **Please use these buttons with caution!** If the change currently occurred in PS (as of today) then click the appropriate refresh button and continue.

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Appendix A - Glossary

Active Position	The position with effective status = (A)ctive and associated with a valid job record with the maximum effective date on or before July1 for 12 month positions/ August 1 for 10 month positions. Positions cannot be funded where the effective status = (I)active. Position status for active positions is (A)pproved. Position status for inactive positions can be (D)eleted, Temporarily (I)nactive or F(R)ozen.
BC	Budget Construction
CSF Position	The position associated with the CSF base funding. This is the position related to the job record that is related to the current job funding record where the CSF flag is turned on.
PAF	Personnel Action Form
PS	PeopleSoft
PS Job	A Peoplesoft job as defined by IU is an employee in a particular position. This is analogous to what most people currently refer to as the appointment. An employee can be in more than one position at a time. This means that for each position the employee is in, there is one and only one job record representing the association.
Valid Appointment	Funding for an Incumbent in a Position is valid only if there is an active job record for the Incumbent and Position. The active record is the record with the maximum effective date and sequence on or before July1 for 12 month employees/ August 1 for 10 month employees and the record does not have an employee status (emp_status) of (T)erminated, (R)etired or (D)eceased. Current allowable status codes are (A)ctive, (L)eave of absence, leave with (P)ay, (S)uspended , (W) – short work break

Org.Rpt/Dmp



Sync Prob-

This is a new report that is available for use by the campus(s) and/or departments to identify those records that have been updated in PS that may have caused a synchronization problem in BC. An example would be if the fte of a position were changed in PS. This could have an effect on the standard hour calculation of an incumbent of that position.