Position Budgeting (cont.)

Entering the Budget for Positions

*Note:* The examples shown in this Guide are based on the *Funded* layout for Positions. Steps are similar for entering data on the Owned and Student layouts. The Additional Filter buttons may vary, but the basic planning functions are similar.

1. Review the summarized points below about entering the Position budget in the white input columns.
   - The current year data is pre-populated in the New Year white budget input columns (FTE, Hourly Rate, Annual Salary, and Cost Distribution %).
   - Use Additional Filters to re-load the data to a subset of positions as needed.
   - Use **Inflate** to apply a percentage of inflation based on the wage pool provided in your Management Center Budget instructions.
   - **Enter values and dollar amounts directly into the fields** in these input columns as needed. Remember that the **Funnel** button can be used to search and find position line items for manual adjustments. **Warning:** If you Inflate while using funneled data, inflation will apply to all loaded data not just funneled data.

2. Use the steps detailed in this section of the guide for the details in using the functions summarized in the step above.
Inflate Salary

Note: The Inflate Salary button allows you to inflate the amounts already populated by a percent of inflation in order to update the input for New Year Annual Salary or New Year Hourly Rate columns. The primary use is to update the New Year Hourly Rate or Annual Salary column based on the wage pool provided in your Management Center budget instructions.

This option will overwrite any budget amounts that are already populated or entered on the layout for Positions.

1. Before using the Inflate button, review all loaded data to determine which New Year (white input) columns need to be inflated.
Position Budgeting (cont.)

2. If needed, use the **PSA Quick Filters** or **Additional Filters** to filter or re-load the data in the layout in order to use the Inflate function on a subset of data. You may also adjust the budget data per the options below:

- **PSA Quick Filters** – to quickly filter data to one or more Personnel Sub-Areas by clicking in the checkbox for Faculty, Staff, and/ or Biweekly.

On the Additional Filter buttons below, use the **Get (name varies by button)** to see choices and select one or more values.

- **PSA Filter – Funded** – to filter to one or more specific Personnel Sub-Areas like Faculty Regular Rank, Faculty Tenured, or Post Doc for Funded data.

- **PSA Filter – Owned** – to filter to one or more specific Personnel Sub-Areas like Faculty Regular Rank, Faculty Tenured, or Post Doc for Owned data.

- **Position Filter – Funded** – to filter to one or more Positions for Funded data.

- **Position Filter – Owned** – to filter to one or more Positions for Owned data.

- **Fund Filter** – to filter to one or more seven-digit Funds (Cost Objects).

- **Cmmt Item Filter** – to filter to one or more six-digit Commitment Items (G/L Accounts).

Note: **Filters vary between Funded, Owned, and Student layouts. Refer to the Budget Tool: General Navigation Guide for additional information and instructions on filters.**

4. In the resulting Inflate Current Salary dialog box, click in the checkbox to indicate the tabs used for the inflation (Funded-Owned layouts or Student layouts).
Position Budgeting (cont.)

5. Enter the percent to inflate (provided by Management Centers) the New Year Annual Salary or New Year Hourly Rate amounts in the Inflation Percent field per examples below:
   
   • To use the New Year dollar amounts and NOT inflate the amounts, use a 0 (zero) percent inflation.
   
   • To use the New Year dollar amounts and inflate by a certain percentage, enter the percentage as a whole number.
   
   • To help with calculating a percent, use the Calculator Drop-down button beside the Inflation Percent field.

6. Click OK to apply the inflate function to the loaded data.

7. Read the message prompting to inflate all loaded data and click the radio button for Yes if the message is correct (click No as needed).

8. Click OK to populate the New Year Budget column with the inflated values based on your selections.
9. Review the results with the New Year Budget column populated with the inflated values based on your selections.

10. Repeat these steps if needed to work with other PSA Quick Filters or Additional Filters and the Inflate function or adjust line items by directly entering amounts into the New Year Annual Salary or New Year Hourly Rate columns as needed.

Note: Be sure to use the Clear Additional Filters button to load ALL data again as needed.

Remember that if you use Inflate on ALL loaded data, you will overwrite any amounts in the New Year input columns that have already been populated or entered on each position. You may choose to inflate by using the filters to create subsets of data versus inflating on ALL data.

11. Click in the check box under the Comments column to add a comment for a specific line item as needed (see Budget Tool: General Navigation Guide for more detailed instructions).

12. Click on Save Only (no edits or fringe calculations) or Calculate and Save as appropriate.
Position Budgeting (cont.)

Manually Enter or Adjust Any New Year Budget Input Columns

1. Use the Funnel button (upper right corner of layout) to visually find and display line items in order to quickly enter budget values or amounts as needed and note the following:

   • See the Budget Tool: General Navigation Guide for specific ways to use the Funnel button.

   • Remember that the Funnel function displays certain line items, but ALL data is still loaded.

   • Any planning functions like Inflate will be applied to all the loaded data, not just the lines displayed visually.

2. Click in the white input fields (for example, the New Year Position FTE, New Year Hourly Rate, New Year Annual Salary or New Year Cost Distribution % columns) and enter the values or amount and press Enter on the keyboard to enter the value.

   Note: As a timesaver, once in a field in an input column, use the Down button on your keyboard to move from one item to the next and update values.
Position Budgeting (cont.)

3. Click in the check box under the Comments column to add a comment for a specific line item as needed (not shown above - see *Budget Tool: General Navigation Guide* for detailed instructions).

4. Click on Save Only (no edits or fringe calculations) or Calculate and Save as appropriate.