Salary Planner and Finance Budget Development Training

For FY20

To access Salary Planner:

- Banner Self Service
- Budget Management tab
- Salary Planner
- Edit Scenario
- FY20 Budget
- Filter by Position Attributes or By Employee name

Difference between Position budget and Job

- Proposed Budget column is the Position budget
- Estimated fiscal year budget is the Employee/Job
- The position budget has to be equal to or greater than the employee/job
- Items in blue on employee side (job labor distribution), i.e. percent, means it can be changed
- Don't advise using 'mass apply' or 'copy estimated budget' Do EACH employee separately
- You can drill down in the employee detail
- On the position side you can add or subtract amounts or percents to get budgeted position budget

To access Finance Budget Development:

- Banner Self Service
- Budget Management tab
- Finance Budget Development
- Create Budget worksheet
- Create Query
- Continue
- Input budget ID '20'
- Input fund and org
- Check to Include all items listed
- Submit
- Change value in field to add or subtract to get to new budgeted amount (DELTA)
- You can add account codes if not listed
- Click Calculate and review
- Click Post
- Any amounts from FY19 showing in FBD will carry over into FY20 unless updated
- DO NOT make changes to salary items in FBD; they can only be done in salary planner, and then they update in FBD every 30 minutes

Reconcile Salary Planner and Finance Budget Development to Budget Base:

Reports to pull from WebFocus Dashboard:

Pull PWB0005a:

- Report shows department, position number, home orgs, account codes.
- Review position budget as of load date and review base salary as of load date and ensure position budget is greater than or equal to base salary. Discrepancies need to be adjusted in salary planner screens.
- Changes made to the position budget in salary planner will reflect in budget column.
- Changes made to the employee job in salary planner are reflected in the change percent columns.
- Base salary + change percent columns = Total new estimated salary

Pull PWB0006 Full time and Part time Staff

- Report includes position number and banner ID
- Report does NOT include position Budget, only salary
- This report shows the current salary + any changes in percent change columns = Anticipated salary
- It also uploads the comments from the HR UOPE personnel reviews and any other comments that were added in salary planner

Pull PWB0010 for Faculty

- Report does NOT include position Budget, nor Position number, only salary
- This report shows the current salary + any changes in percent change columns = Anticipated salary
- It also uploads the comments from the HR UOPE personnel reviews and any other comments that were added in salary planner

Reconciling Salary Planner and FBD:

WebFocus Dashboard/Finance Budget Development/Standard Reports/Finance Budget/Budget Reports

- Pull the FBR002 Budget by Fund in FY20 for your particular Eclass or org or dept, for unrestricted funds
- The totals should agree to the budget base received from the Planning & Budget dept

Any questions, feel free to email the Office of Financial Planning and Budget at budgetoffice@slu.edu, or call Brianne Burcke 7-2991, Janet Strader 7-2891, Kirsten Miller 7-2228, John Severs 7-7073, or Samantha Myers 7-3920.