

Executive Level Process – Employee Budgets (Steps 4 and 4.1)

Overview of the Budget Employee Forms

The form has 4 tabs to allow you to create 2 versions of the Compensation Budget at the Employee and YearTotal level and view 2 versions at the Employee and Monthly level for salary and fringe. Each form contains the Employee structure on the left side, along with Job title and SubAccount. The column headers across the top show Budget data loaded from HR and an area for new data input. The areas in gray cannot be changed because they are pre-loaded or calculated data for viewing purposes only. The white areas are where you may enter data.

On this form the Job Pay Rate, Allocation Percent Rate and Allocation Percent Amount from the HR Budget is provided for you in Load. In the 1st or 2nd Drafts, you can enter % Change to increase or decrease the Job Pay Rate Amount, Change Month to indicate when the % Change will take effect, Allocation Percent Rate to indicate how much your unit will cover of the Job Pay Rate Amount, Start Month to indicate when their pay should start and End Month to indicate when it should end. The Change Month and the Start Month are both defaulted to July. The End Month is defaulted to June.

Create the Compensation Budget in UCSAL at the Account 10 Level

The Executive Level Administrator can create their Compensation Budget in the UCSAL application. In the Budget folder, the Executive Level Administrator can choose to Budget Employees by Account6, Individual Employee, Job Title or SubAccount using any combination of those forms to do so. Each form provides an Annual View on one tab and a Monthly view on another tab. The annual view of each form provides a view of the Employee data loaded from HR, which includes the Job Pay Amount, Allocation % and Job Pay Allocation Amount. The annual view of each form allows the Executive Level Administrator to enter a Change % for the increase or decrease of the job pay amount. They can change the Month for when the increase or decrease will start and the Allocation % to be paid based on the selected row of data. After making changes and saving the data, the new job pay amount and allocation pay amounts will be calculated and displayed in the annual view. The job pay allocation is carried over to the monthly view as a “Suggested” Annual amount. Performing the calculation is not required for existing Employees, TBH’s and Pool Groups. This form is also used to Add Employees, THB’s and Pool Groups, where this information will be required to create the record and display it here and on the monthly form view. This form also is the place where Updates are made to the change the Account, SubAccount, JobTitle or even Employee.

The monthly view now works similarly to UCBUD. For each row metadata will be displayed showing the Employee Name, TBH or Pool Group along with the Account, SubAccount, and Job Title. The data section will be the BegBalance with the suggested Annual amount calculated as read-only, if that was used. The data entry part of the form has the cells with the white background. The user can enter the Budget data at any level displayed. Upon clicking the Save button the form will also calculate any benefit information, if applicable for the employee. Review the knowledge article on Job Pool Attribute Combinations for a more detailed understanding of the benefit codes and levels that determine the rate to be used and subaccount. Subaccounts 1901, 1902 and 1903 are calculated by the system and may not be selected for manual entry. New functionality has been built to allow for manual fringe entry on subaccounts, 1904, 1905, 1906 and 1908. This data entry part of this form is used as the source of data to aggregate and transfer to UCBUD.

This process can be done in the 1st and 2nd Drafts which are available for data entry only to the Executive Level Administrator.

Transferring the Compensation Budget to UCBUD

Once the Compensation Budget is complete for any level within the Account6 hierarchy, the Executive Level Administrator can choose to move the data over to the UCBUD application. This process can range from seconds to several minutes depending on the Account6 level chosen for the transfer when performed on demand by the Executive Level Administrator.

The Executive Level Administrator would navigate to the Launch Business Rules folder and Open the Transfer Budget to UCBUD form. The POV should be changed to the desired Account6 level then the Save button can be clicked to start the process. The process aggregates the data and transfers it to the UCBUD application, where it can be accessed but not changed. Any changes to Compensation data must be made in UCSAL and this process has to be performed again afterwards. Alternatively, every night the compensation budget will transfer to UCBUD.



Demo: Budget Employee by Account 6 and Transfer the Compensation Budget to UCBUD



Exercise: Budget Employee by Account 6 and Transfer the Compensation Budget to UCBUD