



UCOP Planning and Budgeting System (PBS)

WRKFRC100: Workforce
Budgeting

Current as of
December 2019

The University of California logo, featuring the words "UNIVERSITY OF CALIFORNIA" in white, uppercase, sans-serif font, arranged in three horizontal bars. The bars are set against a background of overlapping blue and yellow geometric shapes.

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Before We Begin



Sign the attendance sheet at the beginning and end of the session.



Refrain from engaging in disruptive side conversations.



Silence cell phones, and minimize usage of cell phones and laptops for unrelated tasks during the session.



Check your e-mail during breaks only.



Participate actively, and share your experiences.



Complete the post-training survey prior to leaving this session.

Let's see the expectations from this session.



This Training WILL....

- Frame exercises in standard UCOP scenarios
- Equip staff for the new system
- Discuss Workforce Budgeting
- Rely on active staff involvement



This Training WILL NOT

- Address ALL possible scenarios
- Be the end of learning and ongoing support
- Be a passive event

Course Agenda

Here is the agenda for today's session.

Lesson	Covered Topics / Processes
Existing Employee	<ul style="list-style-type: none">Managing Existing Employee BudgetEmployee Properties
New Hire Employee	<ul style="list-style-type: none">New Hire Budget Planning
Employee Allocation	<ul style="list-style-type: none">Fund and Financial Unit Allocation for Employees, New Hires and New Position
Transfer Pool Budget	<ul style="list-style-type: none">Transfer Pool
Aggregate Budget	<ul style="list-style-type: none">Aggregate Workforce Budget to Parent Level
Data Reconciliation	<ul style="list-style-type: none">Data Validation in Workforce and Financial cube
Workforce Reports	<ul style="list-style-type: none">Review Position vs FTE Report
Workforce Budget - reviewer	<ul style="list-style-type: none">Reviewer tasks related to Workforce Budgets



Delivery Type:

ILT



Prerequisites:

FCST100 IN100



Duration

4 hours 45 minutes



SME Reviewers

Pei-Ru Chao (UCOP)

Robert Baum

Upon completing this course, you will be able to:

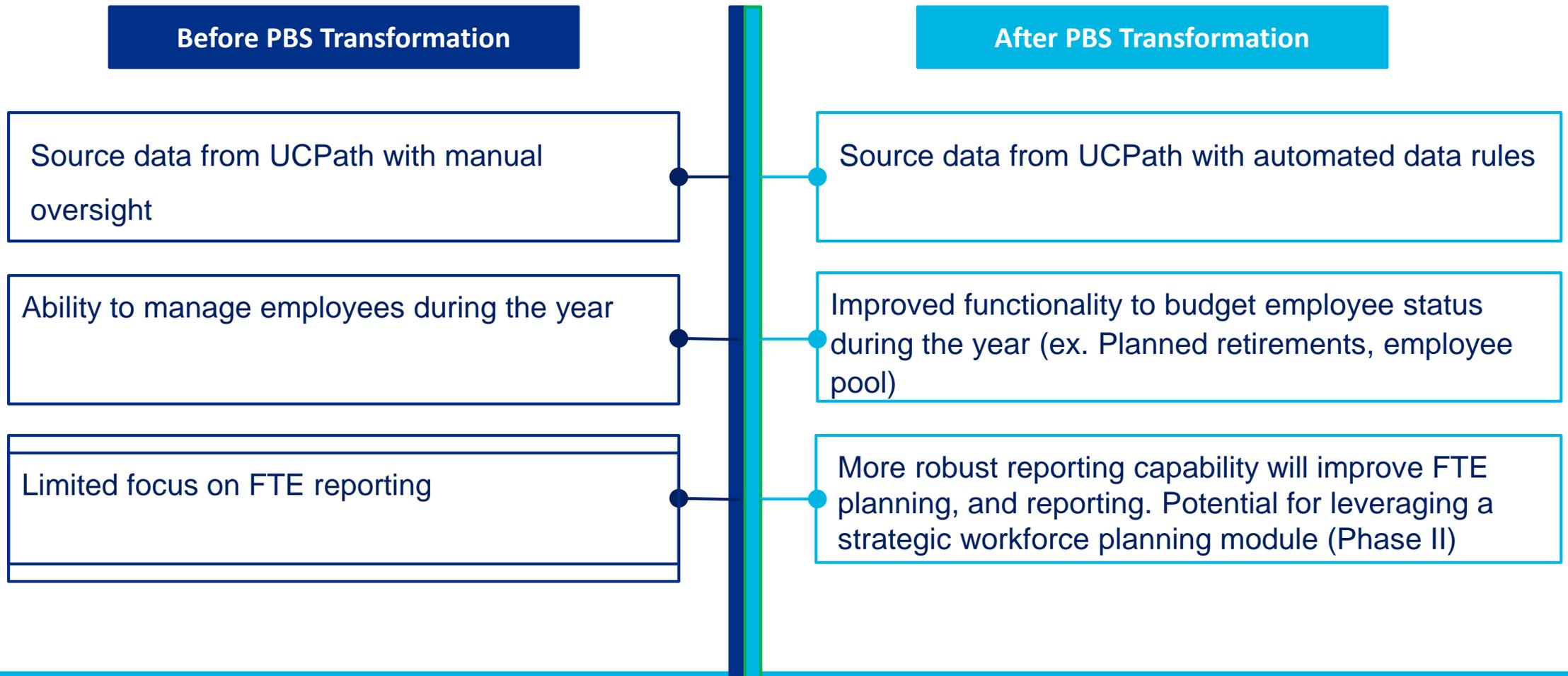
- Explain the key changes in the Workforce Budgeting process in PBS
- List the components of the Workforce module in PBS
- Set up Point of View for the Workforce module in PBS
- Manage job change, transfer, and termination for existing employees
- Budget for new hires
- Plan Fund and Financial Unit Allocation for Employees, New Hires and New Position
- Transfer Positions and Employees to other Financial Units (Transfer Pool)
- Aggregate Budget
- Workforce Planning Budget Data Reconciliation
- Review workforce budget reports

Here are some of the key terms you will come across in this course.

Workforce Budget	Planning activities include budgeting for existing employees and new hires, their associated compensation & costs, not limited to: salaries, benefits, and stipends.
FTE	Fulltime Equivalent, a measure of work effort. One staff member should not be associated with more than 1 FTE.
Job FTE	The FTE associated with a job. For example a fulltime employee with more than one job title might have .75 FTE associated with one job and .25 FTE associated with the other.
Allocation or Distribution	The portion of employee cost assigned to a specific Financial Unit and Fund. Total allocation per employee across all Units and Funds should equal 100%.
Transfer Pool	A holding pool to enable transfers of positions/employees where the Planner doesn't have security to both the "to" and "from" financial units involved in the transfer.

Key Changes

Here is a summary of key changes coming with the overall EPBCS system.



Introduction Roles

Let's meet the roles involved in the Introduction process in PBS

Roles	Manage workforce budgets at Financial Unit and Fund level	Manage expense and employee allocations	Aggregate Budget	Manage workforce budgets at Division level	Manage expense and employee allocations to Funds and Financial Units
PLANNERS	✓	✓	✓		
REVIEWERS				✓	✓

Components of Workforce Module in PBS

The Workforce module in PBS consists of following components.

1. Existing Employees Planning

- a) Updating salary details of employees
- b) Updating properties of employees i.e. FTE
- c) Changing position of employees
- d) Transferring employees to a pool or other financial unit
- e) Transferring employees from a pool to a financial unit
- f) Adding fund and/or Unit allocation for an employee

2. New Positions/Hire planning

- a) Planning/budgeting for new positions
- b) Budgeting can be done for partial FTE
- c) Adding fund and/or Unit allocation to new position

3. Employee Expense Allocation

4. Aggregate Budget

5. Data Reconciliation

6. Review Reports

Components of Workforce Module in PBS (Cont'd)

The following table lists the key points about each component of the Workforce module.

Components	Key Points
 POV Setup	Planners choose dimensions to create their Point of View (POV) while conducting budgeting and planning activities. The Point of View can be setup before performing any tasks by selecting the Unit, Fund, Division and Function.
 Unit/Fund Assignment	Existing employees will begin in the imported UCPATH Unit they are assigned to, but can be assigned to other Unit(s) and/or Fund(s) planned for their cost.
 Compensation Planning	For existing employees, Planners will review salary information as well as any associated merit or benefit costs and take specific actions such as change jobs, transfer, or terminate. New hires will be hired into a specific job and assigned to a unit, accounting entity, financial unit, project, and so on.

Workforce Budget – Existing Employees

Duration: 90 minutes

Lesson: **1** 2 3 4 5 6 7 8

Lesson Objectives

Upon completing this lesson, you will be able to:

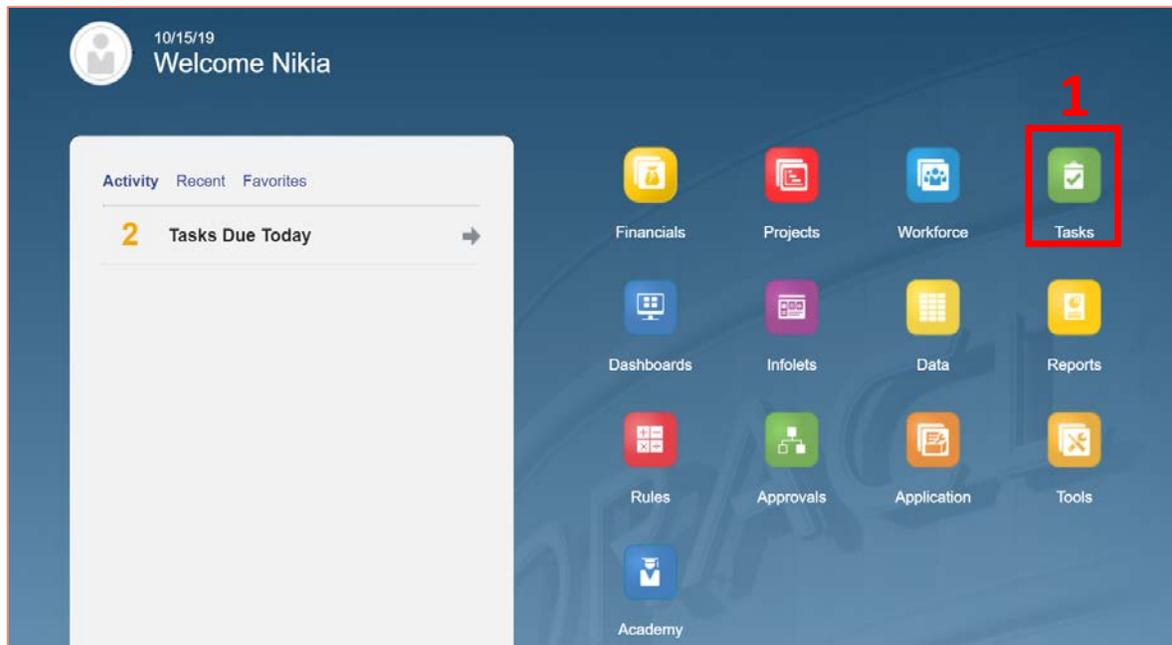
- Manage job change, transfer, and termination for existing employees

Workforce Budgeting – Existing Employees

Existing Employees Budgeting – This task allows users to view details for current employees in any unit and update the details.

Navigating to Existing Employee Task list

1. Access the Tasks tile from the home screen. The Tasks List page will be displayed.
2. In the task list select Workforce Budget to expand the task.
3. Select Existing Employee Budget Planning to begin the process.



The screenshot shows a table titled 'Tasks: All Task Lists' with a filter set to 'All'. The table has columns for Name, Status, Start, End, and Instructions. The 'Workforce Budget' row is expanded, and 'Existing Employee Budget Planning' is highlighted with a red box and the number 3.

Name	Status	Start	End	Instructions
▼ Planner	●			ⓘ
▶ Forecast	●			ⓘ
▼ Budget	●			ⓘ
▶ Revenue Budget	●			ⓘ
▶ Expense Budget	●			ⓘ
▼ Workforce Budget	●			ⓘ
Existing Employee Budget Planning	●			ⓘ
New Hire Budget Planning	●			ⓘ

Workforce Budgeting – Existing Employees

Selecting Unit

1. Select the Unit of the employees, once the Existing Employee Budget Planning form is displayed. A separate form will appear showing all the members of the Unit dimension. (Note – The asterisk symbol (*) can be utilized as a wild card when searching for any members of POVs to prevent scrolling. Ex : To search for Unit 3011050; enter 301* in the search field to view all options that contain the order of numbers.

2. Click OK, once the unit is selected on the members page.

Years	Unit	Division	Salary at full FTE	Distribution%	FTE	Total Compensation	Job FTE
FY20-21	3011050:UCPATI	CTR.PRODUCTION 20520 Chief Operating Officer					
Eagan, Maryann Santos	Position 40001747	000624 HR MGR 1	19963.Systemwide UC Path State General Fund	100%	1.00		1.00
Orozco, Aurora A	Position 40002163	000657 BUS SYS ANL 4	19963.Systemwide UC Path State General Fund	100%	1.00		1.00
Martinez, Alberto Ramon	Position 40124714	007723 BENEFITS SUPV 2	19963.Systemwide UC Path State General Fund	100%	1.00		1.00
Quinones, Jacqueline	Position 40023541	007723 BENEFITS SUPV 2	19963.Systemwide UC Path State General Fund	100%	1.00		1.00
Kaplan, Sara Michelle	Position 40002407	006941 PAYROLL SUPV 2	19963.Systemwide UC Path State General Fund	100%	1.00		1.00
McClain, Stacey	Position 40001986	007719 BENEFITS ANL 2	19963.Systemwide UC Path State General Fund	100%	1.00		1.00
Borrell, Irene	Position 40001980	006943 PAYROLL ANL 2	19963.Systemwide UC Path State General Fund	100%	1.00		1.00
Madrigal, Jesse	Position 40023511	007719 BENEFITS ANL 2	19963.Systemwide UC Path State General Fund	100%	1.00		1.00
Calderon, Alberto	Position 40002385	007595 HR GENERALIST 2	19963.Systemwide UC Path State General Fund	100%	1.00		1.00

Select a Member

Unit: 300000A: Chief Operating Officer

Search Unit

- Total Financial Unit
 - 250000A: Provost & Exec VP-Ac...
 - 300000A: Chief Operating Offi... (checked)
- All Financial Unit
 - 301000B: Operational Services
- Global
 - 350000A: External Relations a...
 - 400000A: Exec VP UC Health
 - 500000A: Sr VP Compliance and...
 - 510000A: Ofc of General Counsel
 - 520000A: Secretary of the Reg...
 - 530000A: Chief Investment Off...
 - 600000A: Systemwide Academic ...
 - 650000A: SVP Res Innov & Fnr

Members: Unit> Total Financial Units> Total Financial Unit> All Financial Unit> 300000A: Chief Operating Officer

Workforce Budgeting – Existing Employees

Selecting Division

1. Next, select a Division after returning to the Existing Employee Budget Planning from selecting a unit. A separate form will appear showing all the members of the Division dimension.
2. Once the division is selected on the members page, click OK.

Years	Unit	Division	Salary at full FTE	Distribution%	FTE	Total Compensation	Job FTE	
FY20-21	3011050.UCPATH CTR-PRODUCT	20520:Chief Operating Officer						
Eagan, Maryann Santos			Position 40001747	000624 HR MGR 1	19963: Systemwide UC Path State General Fund	100%	1.00	1.00
Orozco, Aurora A			Position 40002163	000657 BUS SYS ANL 4	19963: Systemwide UC Path State General Fund	100%	1.00	1.00
Martinez, Alberto Ramon			Position 40124714	007723 BENEFITS SUPV 2	19963: Systemwide UC Path State General Fund	100%	1.00	1.00
Quinones, Jacqueline			Position 40023541	007723 BENEFITS SUPV 2	19963: Systemwide UC Path State General Fund	100%	1.00	1.00
Kaplan, Sara Michelle			Position 40002407	006941 PAYROLL SUPV 2	19963: Systemwide UC Path State General Fund	100%	1.00	1.00
McClain, Stacey			Position 40001986	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General Fund	100%	1.00	1.00
Borrell, Irene			Position 40001980	006943 PAYROLL ANL 2	19963: Systemwide UC Path State General Fund	100%	1.00	1.00
Madrigal, Jesse			Position 40023511	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General Fund	100%	1.00	1.00
Calderon, Alberto			Position 40002385	007595 HR GENERALIST 2	19963: Systemwide UC Path State General Fund	100%	1.00	1.00

Select a Member

Division: 20300:UCOP - Agricultural and Natural Resources

Search Division

Total Unit	All Unit	200A:Office of the President
All Unit	200A:Office of the President	203B:UCOP - Agricultural and ...
No Unit	250A:Fiduciary Activities	204B:UCOP - Systemwide
	300A:Investment Pools	205B:UCOP - Operations
	410A:UCRP	
	420A:UCRSP	
	430A:PERS-VERIP	
	440A:UCRHBT	

Members Division > Total Unit > All Unit > 200A:Office of the President

Workforce Budgeting – Existing Employees

Updating/Validating Employee Properties

1. After selecting the unit and division on the Existing Employee Budget Planning form, right click on the row corresponding to an employee.
2. Next select Employee Properties from the menu option.

The screenshot displays the 'Existing Employee Budget Planning' interface. At the top, there are fields for 'Years' (FY20-21), 'Unit' (3011050:UCPATH CTR:PRODUCTION), and 'Division' (20520:Chief Operating Officer), with a red box and the number '1' highlighting these fields. Below this is a table listing employees with columns for Name, Position, and Fund. A right-click context menu is open over the first row (Eagan, Maryann Santos), with 'Employee Properties' highlighted by a red box and the number '2'. The menu includes options like 'Employee Details', 'Change Position', 'Transfer Employees', 'Plan Departure', 'Change Existing Details', 'Calculate Compensation', 'Add Allocation', 'Restore Employee Details', 'Edit', 'Adjust', 'Supporting Detail', 'Change History', and 'Lock/Unlock Cells'. The background table shows columns for 'Total Compensation' and 'Job FTE'.

Years	Unit	Division	Employee Name	Position	Fund	Total Compensation	Job FTE	
FY20-21	3011050:UCPATH CTR:PRODUCTION	20520:Chief Operating Officer	Eagan, Maryann Santos	Position 40001747	000624 HR MGR 1	19963:Systemwide UC Path State General Fund	1.00	1.00
			Orozco, Aurora A	Position 40002163	000657 BUS SYS ANL 4	19963:Systemwide UC Path State General Fund	1.00	1.00
			Martinez, Alberto Ramon	Position 40124714	007723 BENEFITS SUPV 2	19963:Systemwide UC Path State General Fund	1.00	1.00
			Quinones, Jacqueline	Position 40023541	007723 BENEFITS SUPV 2	19963:Systemwide UC Path State General Fund	1.00	1.00
			Kaplan, Sara Michelle	Position 40002407	006941 PAYROLL SUPV 2	19963:Systemwide UC Path State General Fund	1.00	1.00
			McClain, Stacey	Position 40001986	007719 BENEFITS ANL 2	19963:Systemwide UC Path State General Fund	1.00	1.00
			Borrell, Irene	Position 40001980	006943 PAYROLL ANL 2	19963:Systemwide UC Path State General Fund	1.00	1.00
			Madrigal, Jesse	Position 40023511	007719 BENEFITS ANL 2	19963:Systemwide UC Path State General Fund	1.00	1.00
			Calderon, Alberto	Position 40002385	007595 HR GENERALIST 2	19963:Systemwide UC Path State General Fund	1.00	1.00

Workforce Budgeting – Existing Employees

Updating/Validating Employee Properties & Return to Manage Existing Employee Budget

1. View employee property on Employee Properties Budget tab.
2. Click on Manage Existing Employees- Budget to return to the previous screen.

Existing Employee Budget Planning 1

Manage Existing Employees - Budget Employee Properties - Budget

Save Refresh Actions Complete Previous Next Close

Years: FY20-21 | Unit: 3011050:UCPATH CTR:PRODUCTION | Job: 000624 HR MGR 1 | Employee: Eagan, Maryann Santos

	July	August	September	October	November	December	January	February	March	April	May
Position Effective Date	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19
Pay Group	Monthly										
Budgeted Salary	Annual										
Merit Month											
Earn Code	Regular										
FTE	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Headcount	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
FLSA Status											
Merit Rate											
Status	Active										
Merit %	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%	2.00%
Employee Class	Staff:Career										
Job_Class	MSP										
Position Effective Date	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19	5/9/19
Sal_Grade	24	24	24	24	24	24	24	24	24	24	24
Fund Effective Date	7/1/19	7/1/19	7/1/19	7/1/19	7/1/19	7/1/19	7/1/19	7/1/19	7/1/19	7/1/19	7/1/19
Funding End Date											
Distribution%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Equity or Retention											

Update/View Employee Details

1. After setting the employee properties, return to the Existing Employee Budget Planning form and right click on the row corresponding to an employee.
2. Select Employee Details from the menu options.

The screenshot displays the 'Existing Employee Budget Planning' interface. At the top, there are fields for 'Years' (FY20-21), 'Unit' (3011050:UCPATH CTR:PRODUCTION), and 'Division' (20520:Chief Operating Officer), with a red box and the number '1' highlighting the Unit and Division fields. Below this is a table listing employees with columns for Name, Position, and Fund. A context menu is open over the table, with 'Employee Details' highlighted by a red box and the number '2'. The menu options include: Employee Properties, Employee Details, Change Position, Transfer Employees, Plan Departure, Change Existing Details, Calculate Compensation, Add Allocation, Restore Employee Details, Edit, Adjust, Supporting Detail, Change History, and Lock/Unlock Cells. The table data includes employees like Eagan, Maryann Santos, Orozco, Aurora A, Martinez, Alberto Ramon, Quinones, Jacqueline, Kaplan, Sara Michelle, McClain, Stacey, Borrell, Irene, Madrigal, Jesse, and Calderon, Alberto.

Years	Unit	Division	Position	Fund	Total Compensation	Job FTE
FY20-21	3011050:UCPATH CTR:PRODUCTION	20520:Chief Operating Officer				
Eagan, Maryann Santos	Position 40001747	000624 HR MGR 1	19963:Systemwide UC Path State General Fund	1.00	1.00	
Orozco, Aurora A	Position 40002163	000657 BUS SYS ANL 4	19963:Systemwide UC Path State General Fund	1.00	1.00	
Martinez, Alberto Ramon	Position 40124714	007723 BENEFITS SUPV 2	19963:Systemwide UC Path State General Fund	1.00	1.00	
Quinones, Jacqueline	Position 40023541	007723 BENEFITS SUPV 2	19963:Systemwide UC Path State General Fund	1.00	1.00	
Kaplan, Sara Michelle	Position 40002407	006941 PAYROLL SUPV 2	19963:Systemwide UC Path State General Fund	1.00	1.00	
McClain, Stacey	Position 40001986	007719 BENEFITS ANL 2	19963:Systemwide UC Path State General Fund	1.00	1.00	
Borrell, Irene	Position 40001980	006943 PAYROLL ANL 2	19963:Systemwide UC Path State General Fund	1.00	1.00	
Madrigal, Jesse	Position 40023511	007719 BENEFITS ANL 2	19963:Systemwide UC Path State General Fund	1.00	1.00	
Calderon, Alberto	Position 40002385	007595 HR GENERALIST 2	19963:Systemwide UC Path State General Fund	1.00	1.00	

Workforce Budgeting – Existing Employees

View Employee Details, Update Stipend, Update Car Allowance, & Return to Manage Existing Employee Budget

1. View employee details on Employee Details Budget tab on the Existing Employee Budget Planning form.
2. Click on the Stipend and add if required (to expand the Year Total click on Plus icon).
3. Click on Car allowance cell to update the required values.
4. Click on Save.
5. Click on Manage Existing Employees- Budget to return to the previous screen.

Note: If you enter data at higher level (i.e. Year Total or Q1) it gets distributed equally amongst lower level (i.e. months)

Existing Employee Budget Planning
 Complete

5 Manage Existing Employees - Budget > Employee Details_Budget 1

Years	Unit	Job	Employee	Division													
FY20-21	3011050:UCPATH CTR:PRODUCTION	000624 HR MGR 1	Eagan,Maryann Santos	20520:Chief Operating Officer													
	July	August	September	Q1	Q2	Q3	Q4	YearTotal									
Budgeted Salary																	
Merit																	
Total Salary																	
Benefits																	
Equity \$																	
Stipend	8	8	8	25	25	25	25	100									
Car Allowance 3																	
Total Compensation																	

Workforce Budgeting – Existing Employees

Change Position - Change Position option give planner the ability to change employee’s position to the Vacant position.

1. After setting the employee details, return to the Existing Employee Budget Planning form and right click on the row corresponding to an employee.
2. Select Change Position from the menu options.

The screenshot displays the 'Existing Employee Budget Planning' interface. At the top, there are filters for 'Years' (FY20-21), 'Unit' (3011050:UCPATH CTR:PRODUCTION), and 'Division' (20520:Chief Operating Officer). Below this is a table listing employees. The first row, for 'Eagan, Maryann Santos', is highlighted with a red box and labeled with a red '1'. A context menu is open over this row, with 'Change Position' highlighted by a red box and labeled with a red '2'. The table columns include 'Name', 'Position', 'Division', 'Fund', 'Total Compensation', and 'Job FTE'. The 'Total Compensation' and 'Job FTE' columns show values of 1.00 for the highlighted employee.

Name	Position	Division	Fund	Total Compensation	Job FTE
Eagan, Maryann Santos	Position 40001747	000624 HR MGR 1	19963: Systemwide UC Path State General Fund	1.00	1.00
Orozco, Aurora A	Position 40002163	000657 BUS SYS ANL 4	19963: Systemwide UC Path State General Fund	1.00	1.00
Martinez, Alberto Ramon	Position 40124714	007723 BENEFITS SUPV 2	19963: Systemwide UC Path State General Fund	1.00	1.00
Quinones, Jacqueline	Position 40023541	007723 BENEFITS SUPV 2	19963: Systemwide UC Path State General Fund	1.00	1.00
Kaplan, Sara Michelle	Position 40002407	006941 PAYROLL SUPV 2	19963: Systemwide UC Path State General Fund	1.00	1.00
McClain, Stacey	Position 40001986	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General Fund	1.00	1.00
Borrell, Irene	Position 40001980	006943 PAYROLL ANL 2	19963: Systemwide UC Path State General Fund	1.00	1.00
Madrigal, Jesse	Position 40023511	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General Fund	1.00	1.00
Calderon, Alberto	Position 40002385	007595 HR GENERALIST 2	19963: Systemwide UC Path State General Fund	1.00	1.00

Change Existing Position Window

1. Enter the Hours per week on the Change Position Window that will appear after selecting the Change Position menu option.
2. Next, select the required month from the drop down menu.
3. Select the Target Position from the Target Position box. A new window will appear.
4. Next, enter or search for required position.
5. Select the position and click on OK

UCOP_Change_Position_v1

Hours per week: (1)

* Month: (2)

* Enter Target Position: (3)

Launch Cancel

Select a Member

Position: "Position 40020192"

Position 40020192 x (4)

Results

OK Cancel (5)

UCOP_Change_Position_v1

Hours per week:

* Month:

* Enter Target Position:

Launch (6) Cancel

6. Click on Launch button to submit.

Workforce Budgeting – Existing Employees

Transfer out to Pool

Transfer out to pool options provides planner the ability to transfer employee to a common pool from where they can be transferred to any Unit and Division.

Right click on the row corresponding to an employee.

1. Click on Transfer Employees from the menu options.
2. Select Transfer Out to Pool from the menu options of Transfer Employees.

The screenshot shows the 'Existing Employee Budget Planning' interface. A table lists employees with columns for Name, Position, and Fund. The first row, 'ADAMS, DANA JENISE', is highlighted with a red box and a red '1' next to it. A context menu is open over this row, with 'Transfer Employees' selected and a sub-menu showing 'Transfer Out to Pool' highlighted with a red box and a red '2' next to it. The table also includes columns for 'Salary at full FTE' and 'FTE'.

Years	Unit	Division	Employee Name	Position	Fund	Salary at full FTE	FTE
FY20-21	3011050:Ucpath Ctr:Production	20520:Chief Operating Officer	ADAMS, DANA JENISE	40002121 007719 BENEFITS ANL 2	19963:Systemwide UC Path State General F		
			AHMED, HAFSA	40023735 007734 GEN ACCOUNTANT 4	19963:Systemwide UC Path State General F		
			ALLEN, ANGELLA D	40001107 007584 BUS SYS ANL 3	19963:Systemwide UC Path State General F		
			ALLISON, GAYELEA	40001047 000549 ADMIN MGR 3	19963:Systemwide UC Path State General F		
			ALMANZAR, ALAN JURGEN	40001580 007595 HR GENERALIST 2	19963:Systemwide UC Path State General F		
			ALVAREZ, NYSSA MACIEL	40002388 004722 BLANK AST 3	19963:Systemwide UC Path State General F		
			ANGEL, GRISELDA	40023591 007595 HR GENERALIST 2	19963:Systemwide UC Path State General F		
			ARAGON, HILARY RUTH	40023504 007719 BENEFITS ANL 2	19963:Systemwide UC Path State General F		
			ARCHULETA, EMILY DIANE	40023616 006943 PAYROLL ANL 2	19963:Systemwide UC Path State General F		
			ARREOLA, ANDREW	40001331 004722 BLANK AST 3	19963:Systemwide UC Path State General F		

Workforce Budgeting – Existing Employees

Transfer out to Pool window

1. Enter comments in the Comments box on the Transfer out window that will appear.
2. Select the required month from the drop down menu.
3. Click on Launch button to submit.

The employee will be moved to the Pool and can be viewed in “Transfer Pool Budget” task in the Planner task list.

				Earn Code	FTE	Headcount
ADAMS, DANA JENISE	007719 BENEFITS ANL 2	Position 40002121	19963: Systemwide UC Path State General Fund	Regular	1	1
MOURIS, DINA	000562 ORGANIZATIONAL CNSLT 4	Position 40140074	19963: Systemwide UC Path State General Fund	Regular	1	1
PIHL, SUSAN MARIE	000565 ORGANIZATIONAL DEV MGR 2	Position 40137565	19963: Systemwide UC Path State General Fund	Regular	1	1
RUSSI, DANIEL GEORGE	000550 ADMIN MGR 4	Position 40001212	19963: Systemwide UC Path State General Fund	Regular	1	1

Workforce Budgeting – Existing Employees

Transfer to Financial Unit

Transfer to Financial Unit gives planner the ability to transfer employees to different a Financial Unit.

1. Right click on the row corresponding to an employee.
2. Next, click on Transfer Employees from the menu options.
3. Select Transfer to Financial Unit.

The screenshot displays the 'Existing Employee Budget Planning' interface. At the top, there are filters for 'Years' (FY20-21), 'Unit' (3011050:Ucpath Ctr:Production), and 'Division' (20520:Chief Operating Officer). Below the filters is a table of employees. The first row, 'ADAMS, DANA JENISE', is highlighted with a red box and labeled with a red '1'. A context menu is open over this row, with 'Transfer Employees' highlighted by a red box and labeled with a red '2'. A sub-menu is open over 'Transfer Employees', with 'Transfer to Financial Unit' highlighted by a red box and labeled with a red '3'. The table columns include Name, Position, Department, and Fund. The right side of the interface shows a summary table with columns for 'Salary at full FTE' and 'FTE'.

Years	Unit	Division
FY20-21	3011050:Ucpath Ctr:Production	20520:Chief Operating Officer

Name	Position	Department	Fund
ADAMS, DANA JENISE	40002121	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General F
AHMED, HAFSA	40023735	007734 GEN ACCOUNTANT 4	19963: Systemwide UC Path State General F
ALLEN, ANGELLA D	40001107	007584 BUS SYS ANL 3	19963: Systemwide UC Path State General F
ALLISON, GAYELEA	40001047	000549 ADMIN MGR 3	19963: Systemwide UC Path State General F
ALMANZAR, ALAN JURGEN	40001580	007595 HR GENERALIST 2	19963: Systemwide UC Path State General F
ALVAREZ, NYSSA MACIEL	40002388	004722 BLANK AST 3	19963: Systemwide UC Path State General F
ANGEL, GRISELDA	40023591	007595 HR GENERALIST 2	19963: Systemwide UC Path State General F
ARAGON, HILARY RUTH	40023504	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General F
ARCHULETA, EMILY DIANE	40023616	006943 PAYROLL ANL 2	19963: Systemwide UC Path State General F
ARREOLA, ANDREW	40001331	004722 BLANK AST 3	19963: Systemwide UC Path State General F

Workforce Budgeting – Existing Employees

Transfer to Financial Unit window

1. Enter the comments in Comments box on the UCOP Transfer to Unit window that appears.
2. Select the required month from the drop down menu.
3. Select the Target Financial Unit from the Target Financial Unit box.
4. Search window for Unit opens, search for required Financial Unit.
5. Select the required Financial Unit.
6. Click on OK.
7. Click on Launch button to submit.

UCOP_Transfer_To_FU_v1

1 Comments: Moving to new FU

* Month: July

* Enter Source Financial Unit: "FU_3011050"

* Enter Target Financial Unit: FU_3011060

Launch Cancel

Select a Member

Unit: "3011060:Ucpath Ctr:Quality & Performance"

3011060 x 3011060 4

Results

5 ✓ 3011060:Ucpath Ctr:Quality & ...

OK

UCOP_Transfer_To_FU_v1

Comments: Moving to new FU

* Month: July

* Enter Source Financial Unit: "FU_3011050"

* Enter Target Financial Unit: FU_3011060

Launch Cancel

Transfer Detail

Steps to display employee Transfer details

1. After completing the transfer to financial unit, return to the Existing Employee Budget Planning form and right click on the row corresponding to an employee.
2. Next, click on Transfer Employees from the menu options.
3. Then, select Transfer Details.

The screenshot shows the 'Existing Employee Budget Planning' interface. A table lists employees with columns for Name, Position, and Fund. A red box labeled '1' highlights the first row: ADAMS, DANA JENISE. A context menu is open over this row, with a red box labeled '2' around the 'Transfer Employees' option. A sub-menu is visible, with a red box labeled '3' around the 'Transfer Detail' option.

Years	Unit	Division
FY20-21	3011050:Ucpath Ctr:Production	20520:Chief Operating Officer

Name	Position	Fund
ADAMS, DANA JENISE	Position 40002121 007719 BENEFITS ANL 2	19963: Systemwide UC Path State General F
AHMED, HAFSA	Position 40023735 007734 GEN ACCOUNTANT 4	19963: Systemwide UC Path State General F
ALLEN, ANGELLA D	Position 40001107 007584 BUS SYS ANL 3	19963: Systemwide UC Path State General F
ALLISON, GAYELEA	Position 40001047 000549 ADMIN MGR 3	19963: Systemwide UC Path State General F
ALMANZAR, ALAN JURGEN	Position 40001580 007595 HR GENERALIST 2	19963: Systemwide UC Path State General F
ALVAREZ, NYSSA MACIEL	Position 40002388 004722 BLANK AST 3	19963: Systemwide UC Path State General F
ANGEL, GRISELDA	Position 40023591 007595 HR GENERALIST 2	19963: Systemwide UC Path State General F
ARAGON, HILARY RUTH	Position 40023504 007719 BENEFITS ANL 2	19963: Systemwide UC Path State General F
ARCHULETA, EMILY DIANE	Position 40023616 006943 PAYROLL ANL 2	19963: Systemwide UC Path State General F
ARREOLA, ANDREW	Position 40001331 004722 BLANK AST 3	19963: Systemwide UC Path State General F

Workforce Budgeting – Existing Employees

Transfer Detail window

1. UCOP_Transfer_Details_Bud window will appear after selecting the transfer detail menu option.
2. Form displays Employee transfer details.

Note – This form can be useful to track a point of time that an employee status changed or transferred occurred.

Existing Employee Budget Planning ⓘ

Manage Existing Employees - Budget > 2.0 **UCOP_Transfer_Details_Bud** **1**

2

Years	Employee	Fund	Division	Position	Scenario	Job									
FY20-21	ADAMS,DANA JENISE	19963:Systemwide UC Path State General Fund	20520:Chief Operating Officer	Position 40002121	Budget	007719 BENEFITS ANL 2									
							July	August	September	October	November	December	January	February	March
Earn Code	3011050:Ucpath Ctr:Production						Regular	Regular	Regular	Regular	Regular	Regular	Regular	Regular	Regular
FTE	3011050:Ucpath Ctr:Production						1	1	1	1	1	1	1	1	1
Status	3011050:Ucpath Ctr:Production						Active	Active	Active	Active	Active	Active	Active	Active	Active

Workforce Budgeting – Existing Employees

Plan Departure

1. After completing all the transfer employee details, return to the Existing Employee Budget Planning form and right click on the row corresponding to an employee.
2. Next, click on Plan Departure (if applicable) from the menu options.

Existing Employee Budget Planning

Years: FY20-21 | Unit: 3011050:Ucpath Ctr:Production | Division: 20520:Chief Operating Officer

ADAMS,DANA JENISE	Position 40002121	007719 BENEFITS ANL 2	19963:Systemwide UC Path State Gener	Total Fund
AHMED,HAUSA	Position 40023735	007734 GEN ACCOUNTANT 4	19963:Systemwide UC Path State Gener	Total Fund
ALLEN,ANGELLA D	Position 40001107	007584 BUS SYS ANL 3	19963:Systemwide UC Path State Gener	Total Fund
ALLISON,GAYELEA	Position 40001047	000549 ADMIN MGR 3	19963:Systemwide UC Path State Gener	Total Fund
ALMANZAR,ALAN JURGEN	Position 40001580	007595 HR GENERALIST 2	19963:Systemwide UC Path State Gener	Total Fund
ALVAREZ,NYSSA MACIEL	Position 40002388	004722 BLANK AST 3	19963:Systemwide UC Path State Gener	Total Fund
ANGEL,GRISELDA	Position 40023591	007595 HR GENERALIST 2	19963:Systemwide UC Path State Gener	Total Fund
ARAGON,HILARY RUTH	Position 40023504	007719 BENEFITS ANL 2	19963:Systemwide UC Path State Gener	Total Fund
ARCHULETA,EMILY DIANE	Position 40023616	006943 PAYROLL ANL 2	19963:Systemwide UC Path State Gener	Total Fund
ARREOLA,ANDREW	Position 40001331	004722 BLANK AST 3	19963:Systemwide UC Path State Gener	Total Fund

1 (points to the first row)

- Employee Properties
- Employee Details
- Change Position
- Transfer Employees
- Plan Departure** (with **2**)
- Change Existing Details
- Calculate Compensation
- Add Allocation
- Edit
- Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells
- Filter

Workforce Budgeting – Existing Employees

Plan Departure window

1. Select the required month from the drop down menu on the Plan Departure window that will appear.
2. Next, select the Action : Departed/ Resigned from drop down.
3. Enter the comments in Comments box.
4. Select the Year from Year box.
5. Search window for Year opens.
6. Search for required Year.
7. Select the required Year and click on OK.

Plan Departure

* Month: July (1)

* Action: Departed (2)

Comments: Departed in FY21 (3)

* Select: "DIV_20520"

* Year: "FY21" (4)

Launch Cancel

Select a Member (5)

Years: "FY20-21"

FY21 x

Results

- ✓ FY20-21 (6)
- FY21-22

OK (7)

Plan Departure

* Month: July

* Action: Departed

Comments: Departed in FY21

* Select: "DIV_20520"

* Year: "FY21"

Launch (8) Cancel

8. Click on Launch button to submit.

Workforce Budgeting – Existing Employees

Change Existing Details: Change Existing Details option gives the Planner the ability to change the employee’s status or salary details

1. After completing the plan departure details, return to the Existing Employee Budget Planning form and right click on the row corresponding to an employee.
2. Next, click on Change Existing Details from the menu options.

The screenshot shows the 'Existing Employee Budget Planning' interface. At the top, there are filters for 'Years' (FY20-21), 'Unit' (3011050:Ucpath Ctr:Production), and 'Division' (20520:Chief Operating Officer). Below this is a table of employees. The first row, 'ADAMS, DANA JENISE', is highlighted with a red box and a red '1' next to it. A context menu is open over this row, with 'Change Existing Details' highlighted by a red box and a red '2' next to it. The table contains columns for employee names, positions, and fund codes. The context menu includes options like 'Employee Properties', 'Employee Details', 'Change Position', 'Transfer Employees', 'Plan Departure', 'Change Existing Details', 'Calculate Compensation', 'Add Allocation', 'Edit', 'Adjust', 'Supporting Detail', 'Change History', 'Lock/Unlock Cells', and 'Filter'.

Years	Unit	Division		
FY20-21	3011050:Ucpath Ctr:Production	20520:Chief Operating Officer		
Existing Employee Budget Planning				
ADAMS, DANA JENISE	Position 40002121	007719 BENEFITS ANL 2	19963: Systemwide UC Path State Gener	
AHMED, HAFSA	Position 40023735	007734 GEN ACCOUNTANT 4	19963: Systemwide UC Path State Gener	
ALLEN, ANGELLA D	Position 40001107	007584 BUS SYS ANL 3	19963: Systemwide UC Path State Gener	
ALLISON, GAYELEA	Position 40001047	000549 ADMIN MGR 3	19963: Systemwide UC Path State Gener	
ALMANZAR, ALAN JURGEN	Position 40001580	007595 HR GENERALIST 2	19963: Systemwide UC Path State Gener	
ALVAREZ, NYSSA MACIEL	Position 40002388	004722 BLANK AST 3	19963: Systemwide UC Path State Gener	
ANGEL, GRISELDA	Position 40023591	007595 HR GENERALIST 2	19963: Systemwide UC Path State Gener	
ARAGON, HILARY RUTH	Position 40023504	007719 BENEFITS ANL 2	19963: Systemwide UC Path State Gener	
ARCHULETA, EMILY DIANE	Position 40023616	006943 PAYROLL ANL 2	19963: Systemwide UC Path State Gener	
ARREOLA, ANDREW	Position 40001331	004722 BLANK AST 3	19963: Systemwide UC Path State Gener	
Total Fund			100%	72.019

Change Existing Details- Salary window

1. On the Change Existing Details window that will appear after the previous step, select the Salary option from the Change Employee field. (Use the drop down option to choose between status or salary).
2. Click on Next.

UCOP_Change Existing Details_GT

Employee Change

Select the option to change

1 Change Employee Salary

2 Back Next Launch Cancel

Change Existing Details- Salary window

1. On the next window, UCOP Change Existing Details GT – Status, enter the Year.
2. Then, select the period from the drop down options.
3. Next, select the Salary options from the drop down (drop down options available are: Salary Defaults/ Salary Basis and Rate).
4. Click on Launch button to submit.

The screenshot shows a web form titled "UCOP_Change Existing Details_GT". At the top right, there are four buttons: "Back", "Next", "Launch", and "Cancel". The "Launch" button is highlighted with a red box and the number "4". Below the buttons is the section "Salary Options" with the instruction "Select a Salary Option". The form contains several input fields: "Employee" with value "EMP_10003036", "Job" with value "JOB_007719", "* Year" with value "FY21" (highlighted with a red box and "1"), "* From Period" with a dropdown menu showing "July" (highlighted with a red box and "2"), and "* Salary Options" with a dropdown menu showing "Salary Defaults" (highlighted with a red box and "3").

Workforce Budgeting – Existing Employees

Navigation: Calculate Compensation

- Next select Calculate Compensation from the menu that appears, to re-calculate employee(s) compensation changes.

The screenshot shows the 'Existing Employees' interface. On the left, a list of employees is displayed. The employee 'BUNGE-HEINDL, JENNIFER FAYE' is highlighted with a red box and labeled with a '1'. A context menu is open over this employee, with 'Calculate Compensation' highlighted by a red box and labeled with a '2'. The background shows a table with columns for 'Distribution%', 'Total Compensation', 'Salary at full FTE', 'FTE', and 'Job F'. The table contains data for several employees, including 'LANL MGR 1', 'LANL MGR 2', 'LANL 5', and 'LANL 2'.

	Distribution%	Total Compensation	Salary at full FTE	FTE	Job F
LANL MGR 1	5%			0.05	
19900:General Funds	76%			0.76	
20851:Hatch-Non Integrated-Odd Year	9%			0.09	
20901:Smith-Lever- FD-ACT Amend 1953	10%			0.10	
Total Fund	100%			1.00	
LANL MGR 2	100%			1.00	
Total Fund	100%			1.00	
LANL 5	95%			0.95	
20901:Smith-Lever- FD-ACT Amend 1953	5%			0.05	
Total Fund	100%			1.00	
LANL 2	5%			0.05	
19900:General Funds	75%			0.75	
20851:Hatch-Non Integrated-Odd Year	16%			0.16	

Add Allocation

Add Allocation option provides Planners the ability to add new fund or financial unit allocation/ split for an existing employee.

1. After calculating the compensation, return to the Existing Employee Budget Planning form and right click on the row corresponding to an employee.
2. Select the Add Allocation option from the menu.

The screenshot displays the 'Existing Employee Budget Planning' interface. A table lists employees with columns for Name, Position, Department, and Fund. A red box labeled '1' highlights the first row: Eagan, Maryann Santos, Position 40001747, 000624 HR MGR 1, 19963.Systemwide UC Path State General Fund. A context menu is open over this row, with 'Add Allocation' highlighted by a red box labeled '2'. Other menu items include Employee Properties, Employee Details, Change Position, Transfer Employees, Plan Departure, Change Existing Details, Calculate Compensation, Restore Employee Details, Edit, Adjust, Supporting Detail, Change History, and Lock/Unlock Cells. The table also shows columns for Total Compensation and Job FTE.

Years	Unit	Division	Position	Department	Fund	Total Compensation	Job FTE
FY20-21	3011050.UCPATH CTR.PRODUCTION	20520.Chief Operating Officer	Eagan, Maryann Santos	000624 HR MGR 1	19963.Systemwide UC Path State General Fund	1.00	
			Orozco, Aurora A	000657 BUS SYS ANL 4	19963.Systemwide UC Path State General Fund	1.00	1.00
			Martinez, Alberto Ramon	007723 BENEFITS SUPV 2	19963.Systemwide UC Path State General Fund	1.00	1.00
			Quinones, Jacqueline	007723 BENEFITS SUPV 2	19963.Systemwide UC Path State General Fund	1.00	1.00
			Kaplan, Sara Michelle	006941 PAYROLL SUPV 2	19963.Systemwide UC Path State General Fund	1.00	1.00
			McClain, Stacey	007719 BENEFITS ANL 2	19963.Systemwide UC Path State General Fund	1.00	1.00
			Borrell, Irene	006943 PAYROLL ANL 2	19963.Systemwide UC Path State General Fund	1.00	1.00
			Madrigal, Jesse	007719 BENEFITS ANL 2	19963.Systemwide UC Path State General Fund	1.00	1.00
			Calderon, Alberto	007595 HR GENERALIST 2	19963.Systemwide UC Path State General Fund	1.00	1.00

Workforce Budgeting – Existing Employees

Add Allocation - Add Fund

1. Next, the Add Fund n Unit Allocation_Emp_Bud form will be displayed.
2. Right click on the corresponding row to Add Fund.
3. Click on Add New Fund.

Existing Employee Budget Planning

Manage Existing Employees - Budget > 1.1 **Add Fund n FU Allocation_Emp_Bud** 1

Years	Division	Position	Job	Employee
FY20-21	20520:Chief Operating Officer	Position 40002388	004722 BLANK AST 3	ALVAREZ,NYSSA MACIEL

	Distribution%	Total Compensation	Salary at full FTE
	Assumptions	YearTotal	YearTotal
3011050:Ucpath Ctr:Production	19963:Systemwide UC Path State General Fund	100%	
All Financial Unit	All Fund	100%	

Existing Employee Budget Planning

Manage Existing Employees - Budget > 1.1 **Add Fund n FU Allocation_Emp_Bud**

Years	Division	Position	Job
FY20-21	20520:Chief Operating Officer	Position 40002121	007719 BENEFITS ANL 2 A

3011050:Ucpath Ctr:Production	19963:Systemwide UC Path State General Fund		
3011060:Ucpath Ctr:Quality & Performance	19963:Systemwide UC Path State General Fund		
All Financial Unit	All Fund		

- Add New Fund 3
- Add Financial Unit
- Edit
- Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells
- Filter
- Sort
- Analyze
- New Ad Hoc Grid
- Predictive Planning
- Business Rules
- Smart Push Details

Add Allocation - Add Fund Window

1. Select the Target Fund from the Target Fund box from the Add New Fund option that will be displayed after the previous step.

The screenshot shows the 'UCOP_Add_Fund' window. It has a title bar with a user icon and 'Launch' and 'Cancel' buttons. Below the title bar, there are two text input fields. The first field is labeled '* Target Fund' and contains the text '"FUND_19963"'. The second field is labeled '* Source Fund' and also contains '"FUND_19963"'. A red box highlights the 'Source Fund' field, and a red number '2' is placed to its right. A red number '1' is placed to the left of the 'Target Fund' field. A red arrow points from the 'Source Fund' field to the 'Select a Member' window below.

2. Next enter a fund in the Fund Source field.
3. To search for a fund, select the hierarchy option next to the Source Fund field.
4. Select the Fund.
5. Click on OK.

The screenshot shows the 'Select a Member' dialog box. It has a title bar with a user icon and an 'OK' button. Below the title bar, there is a search bar with the text '"19972:San Joaquin Valley Prime"'. Below the search bar, there is a list of search results. The first result is '19972 x 19972', which is highlighted with a red box and a red number '3'. Below this, there is a section titled 'Results' with three entries: '19972:San Joaquin Valley Prime', '19972:San Joaquin Valley Prime', and '19972:San Joaquin Valley Prime'. The last entry is highlighted with a red box and a red number '4'. A red arrow points from the 'Source Fund' field in the previous window to the search bar in this window. A red number '5' is placed to the right of the 'OK' button.

Workforce Budgeting – Existing Employees

Add Allocation - Add Financial Unit Window

1. Select the Target Financial Unit from the Target Financial Unit box.

The screenshot shows the 'UCOP_Add_FU' window. It has a title bar with a user icon and 'Launch' and 'Cancel' buttons. Below the title bar, there are two input fields. The first is labeled '* Enter Financial Unit' and contains the text 'FU_3011050'. A red box labeled '1' highlights the dropdown arrow icon on the right side of this field. The second field is labeled '* Enter Target Financial Unit' and also contains 'FU_3011050'. A red box labeled '2' highlights the dropdown arrow icon on the right side of this field. A red arrow points from box '2' towards the 'Select a Member' window below.

2. Enter or search for the target Financial Unit. A search window for Financial Unit will be display.
3. Search for required Financial Unit.
4. Select the Financial Unit and click on OK.

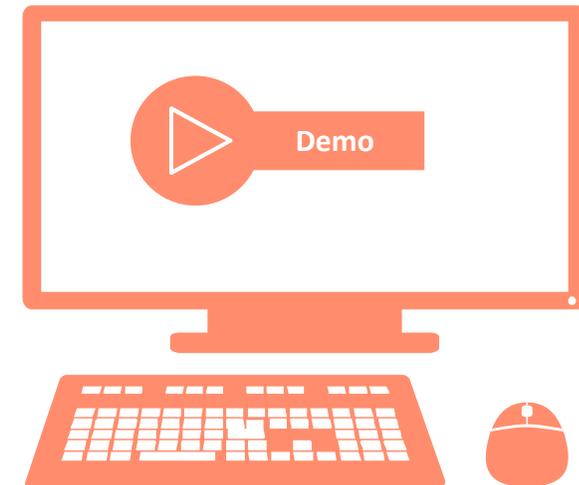
The screenshot shows the 'Select a Member' search window. It has a title bar with a user icon and an 'OK' button. The main area is divided into sections. At the top, there is a search bar with the text '3011050:Ucpath Ctr:Production'. Below this, there is a list of search results. The first result is '3011060 x' with '3011060' in a red box labeled '3'. Below this, there is a 'Results' section with a red box labeled '3' containing the text '3011060:Ucpath Ctr:Quality & ...'. A red arrow points from the 'Select a Member' window back to the 'UCOP_Add_FU' window above.

Let's see a live PBS demonstration!

Existing Employee Budget Planning

Duration: 10 minutes

Description: This demonstration shows how to Budget for Existing Employees.



Let's practice how to budget for employee transfer in PBS.

Existing Employee Budget Planning

Duration: 15 minutes

Complete the following exercise in the training environment:

As a Planner, user wants to Budget for existing employees using each of the steps mentioned in previous slides.

- **Apply the steps to search and review results.**
- **Apply the steps to access online help.**



Let's wrap-up by discussing the key messages from this lesson.

- 1 With the introduction of PBS, all staff compensation costs will be planned by Fund and Unit.
- 2 Budget managers have visibility to see where costs come from (Unit assigned to an employee) and how many employees are charging to that specific Unit and Fund.
- 3 The Workforce module is comprised of multiple components – POV Setup, Unit/Fund Assignment, Compensation Planning, Other Expenses.

Workforce Budget – New Hire

Duration: 70 minutes

Lesson: 1 2 3 4 5 6 7 8

Upon completing this lesson, you will be able to:

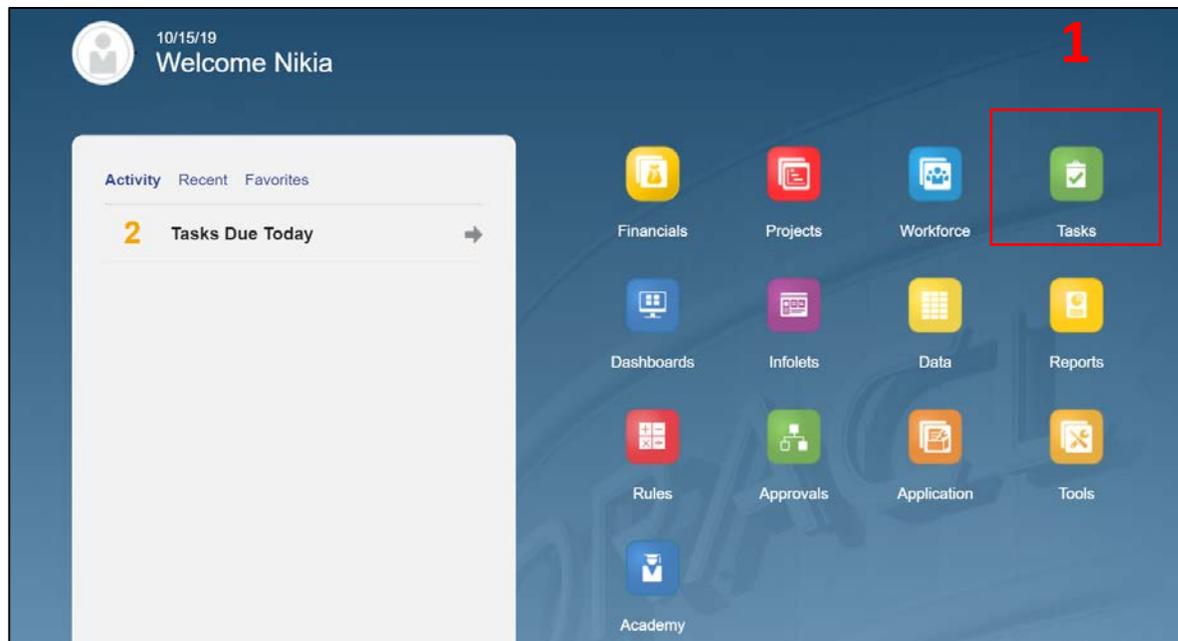
- Budget for new hires
- Plan Fund and Financial Unit Allocation for Employees, New Hires and New Positions *

* New Positions added in the FY20-21 budget require use of Decision Packages

New Hire Budget Planning – The New Hire Budget Planning tasks provide Planners the ability to view existing vacant positions, view new positions that were entered during forecasting, add new positions, add compensation to new positions, and delete positions.

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Planner-> Budget-> Workforce Budget-> New Hire Budget Planning:



Tasks: All Task Lists				
Filter: All				
Name	Status	Start	End	Instructions
▼ Planner	●			ⓘ
▶ Forecast	●			ⓘ
▼ Budget	●			ⓘ
▶ Revenue Budget	●			ⓘ
▶ Expense Budget	●			ⓘ
▼ Workforce Budget	●			ⓘ
Existing Employee Budget Planning	●			ⓘ
New Hire Budget Planning	●			ⓘ

New Hire Budget Planning

1. The New Hire Budget Planning form will be displayed after selecting the New Hire Budget Task. Search and Select Unit once the form is displayed.
2. Next, select the Fund that corresponds to the Unit
3. After selecting the Unit and Fund, select the Division.

Note – Upon selecting the Unit, Fund, and Division dimensions, a new window will appear to show the members of the dimensions for selection. This step is shown in the previous task for existing employees.

Years	Unit	Fund	Division	Total Compensation	Salary at full FTE	FTE	Start Month	Distribution%	Fund Effective Date	Position Effective Date	Sal_Grade
FY20-21	3011050:Ucpath Ctr:Producti...	19963:Systemwide UC Path State General Fun...	20520:Chief Operating Offices			1.00	July	100%	7/1/18	12/26/18	22
						1.00	July	100%	7/1/18	4/10/17	22
						1.00	July	100%	7/1/18	1/3/19	103
						1.00	July	100%	3/1/19	12/17/16	103
						1.00	July	100%	7/1/18	9/4/19	103
						1.00	July	100%	7/1/18	3/26/19	103
						1.00	July	100%	7/1/18	9/5/19	103
						1.00	July	100%	7/1/18	6/6/19	20
						1.00	July	100%	7/1/18	4/23/19	20
						1.00	July	100%	7/1/18	12/11/17	20
						1.00	July	100%	7/1/18	6/1/17	20
						1.00	July	100%	7/1/18	4/5/19	20
						1.00	July	100%	7/1/18	10/12/18	20
						1.00	July	100%	3/6/19	3/6/19	20

Workforce Budgeting – New Hire

Add New Position - Add New Position option gives planner the ability to add a new position

1. After selecting the unit, fund, and division on the New Hire Budget Planning form, select Actions.
2. Next select Add New Position from the menu option.

1

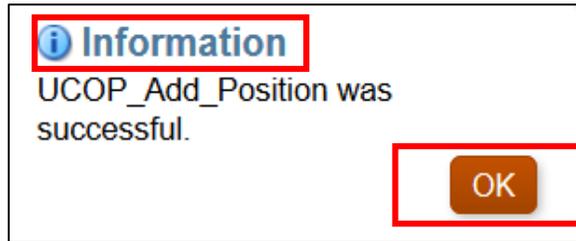
2

Years	Unit	Fund	Division	Total Compensation	Salary at full FTE	FTE	Start Month	Distribution%	Fund Effective Date
FY20-21	3011050:Ucpath Ctr:Production	19963:Systemwide UC Path State General Fund	20520:Chief Operating Officer						
	007723 BENEFITS SUPV 2	Position 40000238				1.00	July	100%	7/1/18
	006941 PAYROLL SUPV 2	Position 40000367				1.00	July	100%	7/1/18
	004722 BLANK AST 3	Position 40002068				1.00	July	100%	7/1/18
		Position 40002158				1.00	July	100%	3/1/19
		Position 40002282				1.00	July	100%	7/1/18
		Position 40002390				1.00	July	100%	7/1/18
		Position 40002464				1.00	July	100%	7/1/18
	007595 HR GENERALIST 2	Position 40023587				1.00	July	100%	7/1/18
		Position 40023594				1.00	July	100%	7/1/18
	007583 BUS SYS ANL 2 NEX	Position 40020196				1.00	July	100%	7/1/18
	007719 BENEFITS ANL 2	Position 40002307				1.00	July	100%	7/1/18
		Position 40023501				1.00	July	100%	7/1/18
		Position 40023502				1.00	July	100%	7/1/18
	005669 TAX CMLPNC ANL 2	Position 40163111				1.00	July	100%	3/6/19

Workforce Budgeting – New Hire

Add New Position

1. The Add Position Business rule is executed after selecting the menu option.
2. Once the successful prompt is displayed click on OK.
3. The New Hire Budget Planning form will display the new position has been added.



New Hire Budget Planning ⓘ

Years: FY20-21 | Unit: 3011050:Ucpath Ctr:Production | Fund: 19963:Systemwide UC Path State General Fund | Division: 20520:Chief Operating Officer

		⊕ Total Compensation	Salary at full FTE	FTE	Start Month	Distribution%	Fund Effective Date	Position Effective Date	Sal_Grade
004329	STDT ACTIVITIES APPT OFFICIAL	New Position 1			July	100%			
007723	BENEFITS SUPV 2	Position 40000238		1.00	July	100%	7/1/18	12/26/18	22
006941	PAYROLL SUPV 2	Position 40000367		1.00	July	100%	7/1/18	4/10/17	22
004722	BLANK AST 3	Position 40002068		1.00	July	100%	7/1/18	1/3/19	103
		Position 40002158		1.00	July	100%	3/1/19	12/17/16	103
		Position 40002282		1.00	July	100%	7/1/18	9/4/19	103
		Position 40002390		1.00	July	100%	7/1/18	3/26/19	103
		Position 40002464		1.00	July	100%	7/1/18	9/5/19	103
007595	HR GENERALIST 2	Position 40023587		1.00	July	100%	7/1/18	6/6/19	20
		Position 40023594		1.00	July	100%	7/1/18	4/23/19	20
007583	BUS SYS ANL 2 NEX	Position 40020196		1.00	July	100%	7/1/18	12/11/17	20
007719	BENEFITS ANL 2	Position 40002307		1.00	July	100%	7/1/18	6/1/17	20
		Position 40023501		1.00	July	100%	7/1/18	4/5/19	20
		Position 40023502		1.00	July	100%	7/1/18	10/12/18	20

Workforce Budgeting – New Hire

Add Compensation to New Position – The Add Compensation to New Position menu option provides the planner the ability to add compensation details to the newly added Position.

1. After adding the new position on the New Hire Budget Planning form, right click on the new position.
2. From the menu option, select Add Compensation to New Position.

New Hire Budget Planning

Years: FY20-21 | Unit: 3011050:Ucpath Ctr:Production | Fund: 19963:Systemwide UC Path State General Fund | Division: 20520:Chief Operati

		Total Compensation	Salary at full FTE	FTE
004329 STDY ACTIVITIES APPT OFFICIAL	New Position 1			
007723 BENEFITS SUPV 2	Position 40000238			1.00
006941 PAYROLL SUPV 2	Position 40000367			1.00
004722 BLANK AST 3	Position 40002068			1.00
	Position 40002158			1.00
	Position 40002282			1.00
	Position 40002390			1.00
	Position 40002464			1.00
007595 HR GENERALIST 2	Position 40023587			1.00
	Position 40023594			1.00
007583 BUS SYS ANL 2 NEX	Position 40020196			1.00
007719 BENEFITS ANL 2	Position 40002307			1.00
	Position 40023501			1.00
	Position 40023502			1.00
005669 TAX CMLPNC ANL 2	Position 40163111			1.00
Total Jobs	All Position			14.00

- Add New Position
- Add Compensation to New Position
- Delete Position
- Change Requisition
- Recalculate Compensation
- Edit
- Adjust
- Comments
- Supporting Detail
- Change History
- Lock/Unlock Cells
- Analyze
- New Ad Hoc Grid
- Predictive Planning

Add Compensation to New Position - Requisition Details, Calendar Information

1. Once the Add Requisition GT – Requisition Details window displays, Enter the Number of requisitions
2. Next, enter FTE for each position
3. Select Employee Type (Regular) from drop down menu (Available Options : Regular/ Contractor/ Temporary)
4. Click on Next
5. In Calendar Information, select Start Year, Start Month, End Year and End Month.
6. Click on Next

The screenshot shows the 'UCOP_Add Requisition_GT' window with the 'Requisition Details' section. The 'Basic required information' section contains four fields: '* No. of requisitions' (value: 1), '* FTE for each' (value: 1), and '* Employee Type' (dropdown menu with 'Regular' selected). The 'Next' button is highlighted with a red box and the number 4. Red numbers 1, 2, and 3 are placed next to the first three fields respectively.

The screenshot shows the 'UCOP_Add Requisition_GT' window with the 'Calendar Information' section. The 'Select Start and End Calendar Information' section contains four fields: '* Start Year' (value: FY21), '* Start Month' (value: July), 'End Year' (value: FY21), and 'End Month' (value: June). A red box highlights all four fields, with the number 5 placed to the left. The 'Next' button is highlighted with a red box and the number 6.

Add Compensation to New Position window- Job and Salary options

1. In Job and Salary Options, select Salary Defaults. (Available options: Salary Defaults and Salary Basis Rate)
2. Click on Next
3. Enter the required comments
4. Select Launch

The screenshot shows the 'UCOP_Add Requisition_GT' window with the 'Job and Salary Options' section. The instruction 'Select a Job and a Salary Option' is present. A dropdown menu is open, showing 'Salary Defaults' selected and highlighted with a red box, and 'Salary Basis and Rate' below it. A red number '1' is placed to the left of the dropdown. In the top right corner, the 'Next' button is highlighted with a red box and a red number '2' is placed below it. Other buttons visible are 'Back', 'Launch', and 'Cancel'.

The screenshot shows the 'UCOP_Add Requisition_GT' window with the 'Comments' section. The instruction 'Enter Comments' is present. A text input field contains 'Salary Defaults Comment' and is highlighted with a red box. A red number '3' is placed below the input field. In the top right corner, the 'Launch' button is highlighted with a red box and a red number '4' is placed below it. Other buttons visible are 'Back', 'Next', and 'Cancel'.

Workforce Budgeting – New Hire

Add Compensation to New Position window- Job and Salary options

1. On the UCOP Add Requisition GT – Job and Salary Options, select Salary Basis and Rate

2. Click on Next

3. Next, enter the Salary Rate

4. Select Salary Basis (Annual) from the drop down menu
(Available Options: Hourly/ Biweekly/ Annual)

5. Enter the comments

6. Click on Launch to launch the Business Rule

Note: Follow the same steps for Employee

Types : Contractor and Temporary

Workforce Budgeting – New Hire

Delete Position - Delete Position option gives planner the ability to Delete any new position

1. Right click on the Position to be deleted
2. Click on Delete Position

1

Years	Unit	Fund	Division	Total Compensation	Salary at full FTE	FTE	Position	Effective Date	Sal_Grade
FY20-21	3011050:Ucpath Ctr:Production	19963:Systemwide UC Path State General Fund	20520:Chief Operat				004329 STDT ACTIVITIES APPT OFFICIAL		
						1.00	New Position 1		
						1.00	007723 BENEFITS SUPV 2	12/26/18	22
						1.00	006941 PAYROLL SUPV 2	4/10/17	22
						1.00	004722 BLANK AST 3	1/3/19	103
						1.00		12/17/16	103
						1.00		9/4/19	103
						1.00		3/26/19	103
						1.00		9/5/19	103
						1.00	007595 HR GENERALIST 2	6/6/19	20
						1.00		4/23/19	20
						1.00	007583 BUS SYS ANL 2 NEX	12/11/17	20
						1.00	007719 BENEFITS ANL 2	6/1/17	20
						1.00		4/5/19	20
						1.00		10/12/18	20
						1.00	005669 TAX CMLPNC ANL 2	3/6/19	20
						14.00	Total Jobs		

2

3. A business rule to delete the position is executed and the status will display in an information prompt..

4. Click on OK

3

4

Note – User can not retrieve position once it has been deleted.

Change Requisition

1. From UCOP Change Requisition window, select Change Requisition from drop down (Select Status).
(Available options: Status/ Salary)
2. Click Next to go to the next step.

The screenshot shows the 'UCOP_Change Requisition_GT' window. At the top right, there are four buttons: 'Back', 'Next', 'Launch', and 'Cancel'. The 'Next' button is highlighted with a red box and a red number '2' below it. Below the buttons is the 'Requisition Change' section with the instruction 'Select the option to change'. A dropdown menu is open, showing three options: 'Status', 'Status', and 'Salary'. The first 'Status' option is highlighted with a blue bar and a red box, with a red number '1' to its left. The label '* Change Requisition' is positioned to the left of the dropdown menu.

Workforce Budgeting – New Hire

Change Requisition- Status

1. Enter or Select the Year.
(Available Options: New, Active, Approved, Unapproved, On-hold, and Closed)
2. Select Hiring Status from the drop down options.
(Available Options: New, Active, Approved, Unapproved, On-hold, and Closed)
3. Click on Launch to launch the Business rule.

The screenshot shows the UCOP_Change Requisition_GT form. At the top right, there are buttons for Back, Next, Launch, and Cancel. The Launch button is highlighted with a red box and a red number 3. Below the buttons, the form has a 'Status' section with the text 'Select a Status'. The main form area contains several fields: 'Hiring Requisition' with the value 'No_Emp', '* Year' with the value 'FY21' (highlighted with a red box and a red number 1), and 'Job' with the value 'JOB_007723'. Below these is a '* Hiring Status' dropdown menu (highlighted with a red box and a red number 2) which is open, showing a list of options: New, Active, Approved, Unapproved, On-hold, and Closed.

Workforce Budgeting – New Hire

Change Requisition- Salary

1. From UCOP Change Requisition window, select Change Requisition from drop down (Select Salary).

(Available options: Status/ Salary)

2. Click Next to go to the next step.

UCOP_Change Requisition_GT

Back Next Launch Cancel

Requisition Change

Select the option to change

1 * Change Requisition Salary

3. Enter or Select the Year.

4. Select month from the drop down.

5. Select Salary options from drop down menu.

(Available options : Salary Defaults, Salary Basis and Rate, and Salary Grade)

6. Click on Launch button to submit.

UCOP_Change Requisition_GT

Back Next Launch Cancel

Salary Options

Select a Salary Option

Hiring Requisition No_Emp

Job JOB_007723

3 * Year FY21

* From Period July 4

5 Salary Options Salary Defaults

- Salary Defaults
- Salary Basis and Rate
- Salary Grade

Workforce Budgeting – New Hire

Recalculate Compensation - This task recalculates compensation after a change in requisition-salary

1. Right click on the New Position where changes were applied.
2. Click on Recalculate Compensation.

Years	Unit	Fund	Division
FY20-21	3011050:Ucpath Ctr.Production	19963:Systemwide UC Path State General Fund	20520:Chief Operati

	Total Compensation	Salary at full FTE	FTE
004329 STDT ACTIVITIES APPT OFFICIAL - New Position 1			
007723 BENEFITS SUPV 2 - Position 40000238			1.00
006941 PAYROLL SUPV 2 - Position 40000367			1.00
004722 BLANK AST 3 - Position 40002068			1.00
- Position 40002158			1.00
- Position 40002282			1.00
- Position 40002390			1.00
- Position 40002464			1.00
007595 HR GENERALIST 2 - Position 40023587			1.00
- Position 40023594			1.00
007583 BUS SYS ANL 2 NEX - Position 40020196			1.00
007719 BENEFITS ANL 2 - Position 40002307			1.00
- Position 40023501			1.00
- Position 40023502			1.00
005669 TAX CMLPNC ANL 2 - Position 40163111			1.00
Total Jobs - All Position			14.00

Position Effective Date	Sal_Grade
12/26/18	22
4/10/17	22
1/7/19	103
12/17/16	103
9/4/19	103
3/26/19	103
9/5/19	103
6/6/19	20
4/23/19	20
12/11/17	20
6/1/17	20
4/5/19	20
10/12/18	20
3/6/19	20

3. A Recalculate Compensation business rule is executed and displays the Information:
4. Click on OK.

Information
Calculate New Hire Compensation was successful.
OK

Let's see a live PBS demonstration!

Budget for New Hires

Duration: 15 minutes

Description: This demonstration shows how to budget for new hires.



Let's practice how to budget for new hires in PBS.

Budget for New Hires

Duration: 25 minutes

Complete the following exercise in the training environment:

As a planner, user wants to add three new employees across positions in the process of budgeting for new hires.

- Apply the steps to search and review results.
- Apply the steps to access online help.



Lesson Key Messages

Let's wrap-up by discussing the key messages from this lesson.

- 1 Job change leads to change in job of an employee for the selected period and in turn leads to change in paying Unit for an employee.
- 2 Transfer results in change of department (or Unit) against which the employee's compensation expenses are calculated for the selected period.
- 3 Budgeting for new hires is the process of creating hiring requisitions and allocating expenses from the workforce budget to the newly added requisitions.

Workforce Budget – Employee Expense Allocation

Duration: 45 minutes

Lesson: 1 2 3 4 5 6 7 8

Lesson Objectives

Upon completing this lesson, you will be able to:

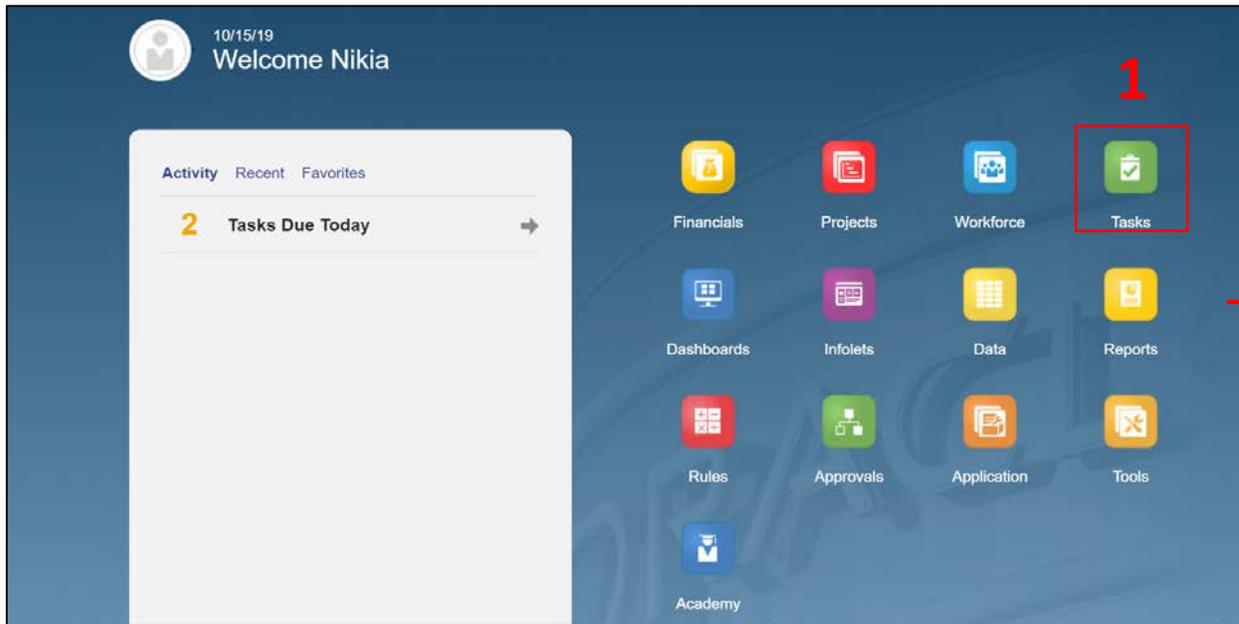
- Assign employees to default Unit and Fund.
- Update employee allocation between multiple Units or Funds.
- Allocate workforce expenses for employees by Unit and Fund.

Workforce Budgeting – Employee Expense Allocation

Employee Allocation– The Employee Allocation tasks provide Planners the ability to add new fund or unit allocation/ split for an employee (existing or new hire)

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Planners-> Budget-> Workforce-> Employee Expense Allocation Budget.



The screenshot shows a table titled 'Tasks: All Task Lists' with a filter set to 'All'. The table has columns for Name, Status, Start, End, and Instructions. The 'Employee Expense Allocation Budget' row is highlighted with a red box and a red '2'. A red arrow from the 'Tasks' tile in the previous screenshot points to the 'Budget' section of this table.

Name	Status	Start	End	Instructions
▼ Planner	●			ⓘ
▶ Forecast	●			ⓘ
▼ Budget	●			ⓘ
▶ Revenue Budget	●			ⓘ
▶ Expense Budget	●			ⓘ
▼ Workforce Budget	●			ⓘ
Existing Employee Budget Planning	●			ⓘ
New Hire Budget Planning	●			ⓘ
Employee Expense Allocation Budget	●			ⓘ

Workforce Budgeting – Employee Expense Allocation



View Employee Expense Allocation Budget

1. The Employee Expense Allocation Budget form will be displayed after selecting the Employee Expense Allocation Budget Task. Search and select the Division.
2. After selecting the Division, then select the Unit.

Note – Upon selecting the Unit, Fund, and Division dimensions, a new window will appear to show the members of the dimensions for selection. This step is shown in the previous task for existing employees.

The screenshot shows the 'Employee Expense Allocation Budget' interface. At the top, there are buttons for 'Save', 'Refresh', 'Actions', 'Complete', 'Previous', 'Next', and 'Close'. Below these, the 'Years' are set to 'FY20-21'. The 'Unit' field is highlighted with a red box and labeled '2', containing the value '3011050:UCPATH CTR.PRODUCTION'. The 'Division' field is labeled '1' and contains '20520:Chief Operating Officer'. Below the header, there is a table with columns for 'Employee Name', 'Position', 'Fund', 'Distribution%', and 'Total Compensation'. The table lists several employees and their associated data.

Employee Name	Position	Fund	Distribution%	Total Compensation	
Eagan, Maryann Santos	Position 40001747	000624 HR MGR 1	19963: Systemwide UC Path State General Fund	100%	
		Total Fund	100%		
Orozco, Aurora A	Position 40002163	000657 BUS SYS ANL 4	19963: Systemwide UC Path State General Fund	100%	
		Total Fund	100%		
Martinez, Alberto Ramon	Position 40124714	007723 BENEFITS SUPV 2	19963: Systemwide UC Path State General Fund	100%	
		Total Fund	100%		
Quinones, Jacqueline	Position 40023541	007723 BENEFITS SUPV 2	19963: Systemwide UC Path State General Fund	100%	
		Total Fund	100%		
Kaplan, Sara Michelle	Position 40002407	006941 PAYROLL SUPV 2	19963: Systemwide UC Path State General Fund	100%	
		Total Fund	100%		
McClain, Stacey	Position 40001986	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General Fund	100%	
		Total Fund	100%		
Borrell, Irene	Position 40001980	006943 PAYROLL ANL 2	19963: Systemwide UC Path State General Fund	100%	
		Total Fund	100%		
Madrigal, Jesse	Position 40023511	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General Fund	100%	
		Total Fund	100%		
Calderon, Alberto	Position 40002385	007595 HR GENERALIST 2	19963: Systemwide UC Path State General Fund	100%	
		Total Fund	100%		
Barajas, Matthew Jacob	Position 40023610	006943 PAYROLL ANL 2	19963: Systemwide UC Path State General Fund	100%	

Workforce Budgeting – Employee Expense Allocation



Add Allocation

1. After selecting the division and unit, right click on the row corresponding with the employee that changes will apply.
2. Click on Add Allocation

Employee Expense Allocation Budget

Years: FY20-21 | Unit: 3011050:UCPATH CTR:PRODUCTION | Division: 20520:Chief Operating Officer

Employee Name	Position	Job Code	Fund	Distribution%
Eagan, Maryann Santos	40001747	000624 HR MGR 1	19963: Systemwide UC Path State General Fund	100%
Orozco, Aurora A	40002163	000657 BUS SYS ANL 4	19963: Systemwide UC Path State General Fund	100%
Martinez, Alberto Ramon	40124714	007723 BENEFITS SUPV 2	19963: Systemwide UC Path State General Fund	100%
Quinones, Jacqueline	40023541	007723 BENEFITS SUPV 2	19963: Systemwide UC Path State General Fund	100%
Kaplan, Sara Michelle	40002407	006941 PAYROLL SUPV 2	19963: Systemwide UC Path State General Fund	100%
McClain, Stacey	40001986	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General Fund	100%
Borrell, Irene	40001980	006943 PAYROLL ANL 2	19963: Systemwide UC Path State General Fund	100%
Madrigal, Jesse	40023511	007719 BENEFITS ANL 2	19963: Systemwide UC Path State General Fund	100%
Calderon, Alberto	40002385	007595 HR GENERALIST 2	19963: Systemwide UC Path State General Fund	100%
Barajas, Matthew Jacob	40023610	006943 PAYROLL ANL 2	19963: Systemwide UC Path State General Fund	100%

1 (Red box around the first row)

2 (Red box around the 'Add Allocation' menu item)

Actions menu items: Add Allocation, Edit, Adjust, Supporting Detail, Change History, Lock/Unlock Cells, Filter, Sort, Analyze, New Ad Hoc Grid, Predictive Planning, Business Rules, Smart Push Details, Grid Validation Messages

Workforce Budgeting – Employee Expense Allocation

Add Allocation- Add Fund

1. After selecting Add Allocation from the menu, the Add Fund and FU Allocation_Emp_Bud form will be displayed.

Employee Expense Allocation Budget				
1.0 Fund Allocation_Emp Level Budget > 1.1 Add Fund n FU Allocation_Emp_Bud				
Years	Division	Position	Job	Employee
FY20-21	20520:Chief Operating Officer	Position 40002121	007719 BENEFITS ANL 2	ADAMS,DANA JENISE
			Distribution%	Total Compensation
			Assumptions	YearTotal
3011050:Ucpath Ctr:Production		19963:Systemwide UC Path State General Fund		100%
All Financial Unit		All Fund		100%

2. Right click on the to Add Fund

3. Select Add New Fund

Employee Expense Allocation Budget				
1.0 Fund Allocation_Emp Level Budget > 1.1 Add Fund n FU Allocation_Emp_Bud				
Years	Division	Position	Job	Employee
FY20-21	20520:Chief Operating Officer	Position 40002121	007719 BENEFITS ANL 2	ADAMS,DANA JENISE
			Distribution%	Total Compensation
			Assumptions	YearTotal
3011050:Ucpath Ctr:Production		19963:Systemwide UC Path State General Fund		100%
All Financial Unit		All Fund		100%

- Add New Fund
- Add Financial Unit
- Edit
- Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells
- Filter
- Sort
- Analyze
- New Ad Hoc Grid
- Predictive Planning
- Business Rules
- Smart Push Details

Workforce Budgeting – Employee Expense Allocation

Add Allocation- Add Fund Window

1. Next, select the Target Fund from the Target Fund box

The screenshot shows the 'UCOP_Add_Fund' window. It has a title bar with a user icon and 'Launch' and 'Cancel' buttons. Below the title bar, there are two text input fields: '* Target Fund' containing 'FUND_19963' and '* Source Fund' containing 'FUND_19963'. A red box labeled '1' highlights the dropdown arrow on the right side of the 'Target Fund' field.

2. Once the member window appears, search the window for Fund
3. Select the Fund
4. Click on OK

The screenshot shows the 'Select a Member' window. It has a title bar with a user icon and an 'OK' button. Below the title bar, there is a search bar with the text 'Fund' and a dropdown arrow. Below the search bar, there is a list of results. The first result is '19972:San Joaquin Valley Prime'. A red box labeled '2' highlights the search bar. Below the search bar, there is a list of results. The first result is '19972:San Joaquin Valley Prime'. A red box labeled '3' highlights this result. Below the list of results, there is a red box labeled '4' highlighting the 'OK' button.

Workforce Budgeting – Employee Expense Allocation

Add Allocation - Add Financial Unit

1. In Add Fund n FU Allocation Emp Bud form, right click on the row to Add Financial Unit
2. Select Add Financial Unit

Employee Expense Allocation Budget

1.0 Fund Allocation_Emp Level Budget > 1.1 Add Fund n FU Allocation_Emp_Bud

Years	Division	Position	Job	District	Assn	Rate	Rate at full	TE
FY20-21	20520:Chief Operating Officer	Position 40002121	007719 BENEFITS ANL					
3011050:Ucpath Ctr:Production						19963:Systemwide UC Path State General Fund		
All Financial Unit						All Fund		
								Total

- Add New Fund
- Add Financial Unit 2
- Edit
- Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells
- Filter
- Sort
- Analyze
- New Ad Hoc Grid
- Predictive Planning
- Business Rules
- Smart Push Details

1

Add Allocation - Add Financial Unit Window

1. After selecting Add Financial Unit from the menu option, select the Target Financial Unit from the Target Financial Unit box

UCOP_Add_FU

* Enter Financial Unit "FU_3011050" **1** * Enter Target Financial Unit "FU_3011050"

Launch Cancel

2. Once the member window appears, search for Financial Unit
3. Select the required Financial Unit
4. Click on OK
5. Repeat the same steps to Enter Target Financial Unit
6. Select Launch

Select a Member

Unit
"3011060:Ucpath Ctr:Quality & Performance"

3011060 x **2** 3011060

Results

✓ 3011060:Ucpath Ctr:Quality & ... **3**

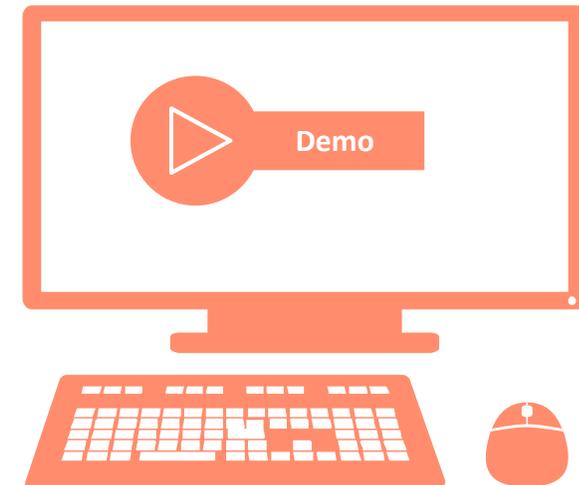
OK **4**

Let's see a live PBS demonstration!

Allocate Employees to Unit or Fund

Duration: 10 minutes

Description: This demonstration shows how to allocate employees to a Unit or Fund.



Let's Practice!

Let's practice how to budget for employees in PBS

Allocate Employees to Unit or Fund

Duration: 20 minutes

Complete the following exercise in the training environment:

As a planner, user wants to allocate new financial unit and new fund to a specific employee.

- Apply the steps to search and review results.
- Apply the steps to access online help.



Lesson Key Messages

Let's wrap-up by discussing the key messages from this lesson.

1 Labor Allocation refers to the process of allocating employees to Units and Funds based on the input allocation percentages.

2 The **Allocations** tab allows you to assign a percentage value of allocation of an employee to one or more Units and Funds such that the total allocation per employee is 100 percent.

Workforce Budget – Transfer Pool

Duration: 40 minutes

Lesson: 1 2 3 4 5 6 7 8

Upon completing this lesson, you will be able to:

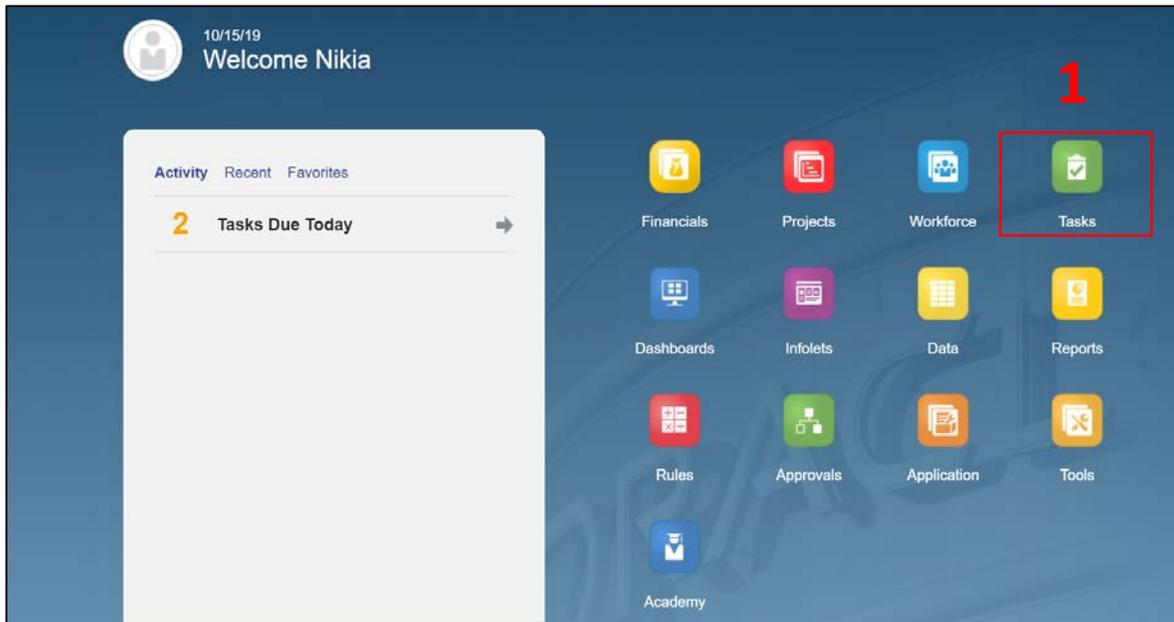
- Transfer an employee from one Unit to another
- Manage employee costs within an Unit
- Accurately record and account for employee funding

Workforce Budgeting – Transfer Pool

Transfer Pool– The Transfer Pool Budget tasks provide Planners the ability to transfer employee to any Financial Unit and Division from a common Pool

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Planner-> Budget-> Workforce Budget-> Transfer Pool Budget



The screenshot shows a table titled 'Tasks: All Task Lists' with a 'Filter: All' dropdown. The table has columns for Name, Status, Start, End, and Instructions. The 'Name' column is expanded to show a hierarchy: Planner, Forecast, Budget, Revenue Budget, Expense Budget, Workforce Budget, Existing Employee Budget Planning, New Hire Budget Planning, Employee Expense Allocation Budget, and Transfer Pool Budget (highlighted with a red box and the number '2').

Name	Status	Start	End	Instructions
▼ Planner	●			(i)
▶ Forecast	●			(i)
▼ Budget	●			(i)
▶ Revenue Budget	●			(i)
▶ Expense Budget	●			(i)
▼ Workforce Budget	●			(i)
Existing Employee Budget Planning	●			(i)
New Hire Budget Planning	●			(i)
Employee Expense Allocation Budget	●			(i)
Transfer Pool Budget	●			(i)

Transfer Pool Budget - Planners can view employees that are currently in pool and do not belong to any Unit. From here the employee can be transferred in to desired Financial Unit.

1. After selecting the Transfer Budget Pool task from the task list, Transfer Pool form with employees details that are currently in pool appear.

				Earn Code	FTE	Headcount	
ADAMS,DANA JENISE	007719 BENEFITS ANL 2	Position 40002121	19963:Systemwide UC Path State General Fund	Regular	1	1	
MOURIS,DINA	000562 ORGANIZATIONAL CNSLT 4	Position 40140074	19963:Systemwide UC Path State General Fund	Regular	1	1	
PIHL,SUSAN MARIE	000565 ORGANIZATIONAL DEV MGR 2	Position 40137565	19963:Systemwide UC Path State General Fund	Regular	1	1	
RUSSI,DANIEL GEORGE	000550 ADMIN MGR 4	Position 40001212	19963:Systemwide UC Path State General Fund	Regular	1	1	

Workforce Budgeting – Transfer Pool

Transfer Pool Budget – Transfer In

1. Right click on an employee to be transferred in to any Financial Unit.
2. After Select Transfer In

Transfer Pool Budget ⓘ

Years
FY20-21

1	HANSON,CHRISTOPHER	007300 APPLICATIONS PROGR 3	Position 40000915	19943:UC General Funds		
				19900:General Funds		
					Headcount	
						1
						1

2

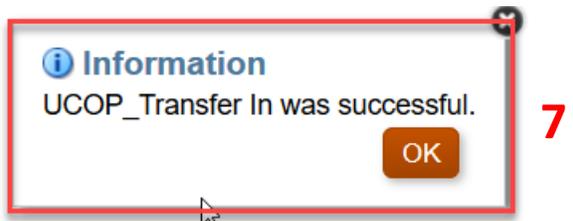
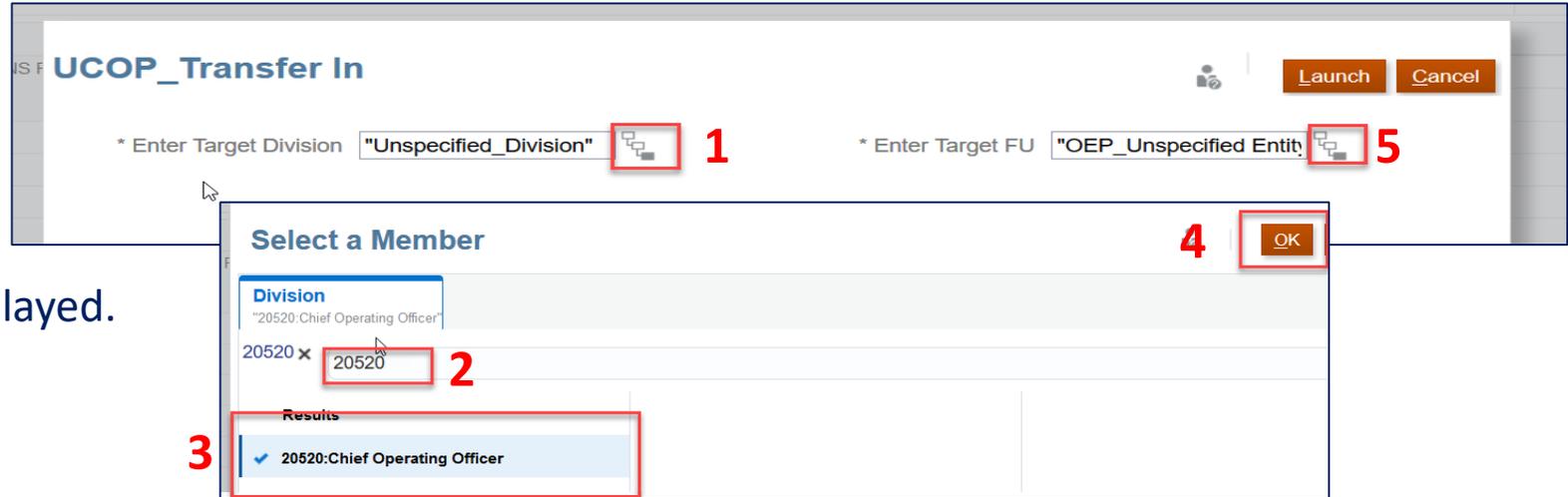
- Transfer In
- Edit
- Adjust
- Supporting Detail
- Change History
- Lock/Unlock Cells

Save Ref

Workforce Budgeting – Transfer Pool

Transfer In– Window

1. From UCOP Transfer In Window, select Division and Financial Unit to which employee has to be transferred.
2. Click on search and search for Division.
3. Select division.
4. Click on OK.
5. Follow same steps for Financial Unit.
6. Next, click on Launch to submit.
7. Transfer In was successful message is displayed.

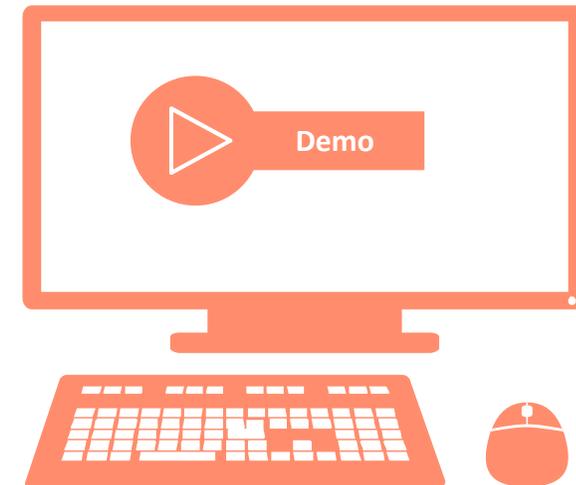


Let's see a live PBS demonstration!

Budget for Employee Transfer

Duration: 10 minutes

Description: This demonstration shows how to budget for employee transfer.



Let's practice how to budget for employee transfer in PBS.

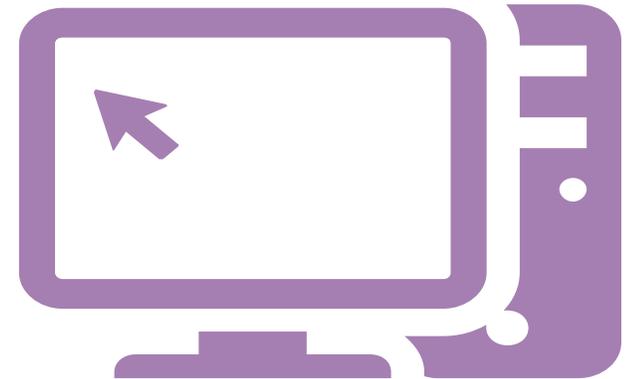
Budget for Employee Transfer

Duration: 15 minutes

Complete the following exercise in the training environment:

As a planner, user wants to transfer in an employee that was previously transferred to pool in Existing Employee Budget Planning form.

- Apply the steps to search and review results.
- Apply the steps to access online help.



Lesson Key Messages

Let's wrap-up by discussing the key messages from this lesson.

- 1** An **employee transfer** refers to the transfer of an employees across entities.
- 2** A **job change** refers to change in the designation and calculation of compensation based on the new title.

Aggregate Budget

Duration: xx minutes

Lesson: 1 2 3 4 5 6 7 8

Lesson Objectives

Upon completing this lesson, you will be able to:

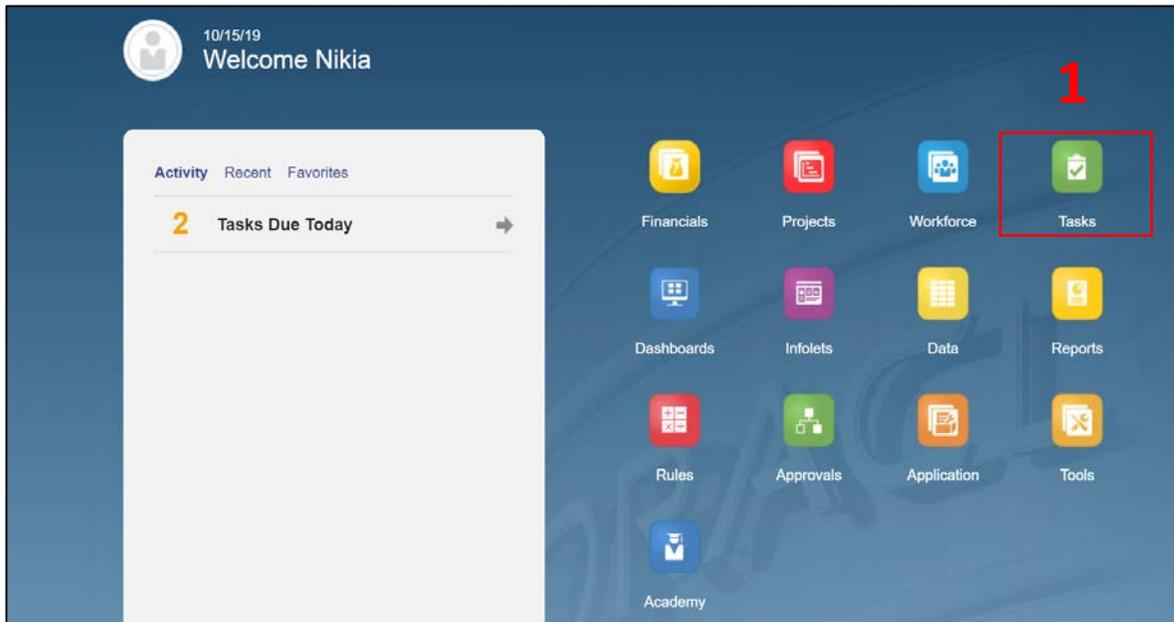
- Aggregate the Budget values for Workforce

Workforce Budgeting – Aggregate Budget

Aggregate Budget – The Aggregate Budget tasks provide Planners the ability to aggregate the workforce data for Budget to parent level members. Note – Aggregation can be performed multiple times at any time.

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Planner-> Budget-> Workforce Budget-> Aggregate Budget



The screenshot shows a table with a filter set to 'All'. The table has columns for Name, Sta Start, End, Instructions, and Action. The 'Aggregate Budget' row is highlighted with a red box and a red '2'. A red arrow points from the 'Tasks' tile in the previous image to this table.

Name	Sta Start	End	Instructions	Action
▼ Planner	●		ⓘ	⋮
▶ Forecast	●		ⓘ	⋮
▼ Budget	●		ⓘ	⋮
▶ Revenue Budget	●		ⓘ	⋮
▼ Workforce Budget	●		ⓘ	⋮
Existing Employee Budget Planning	●		ⓘ	⋮
New Hire Budget Planning	●		ⓘ	⋮
Employee Expense Allocation Budget	●		ⓘ	⋮
Transfer Pool Budget	●		ⓘ	⋮
Aggregate Budget	●		ⓘ	⋮

Aggregate Budget

1. Click on Launch after opening the task.

Aggregate Budget

Cube OEP_WFP
Business Rule UCOP_Aggregate_Budget

Launch 1

Complete Previous Next Close

2. Select the Unit and Division from the Hierarchy selection and click on Launch.

2

UCOP_Agg_Bud

* 1:Unit
FU_3031010

* 1:Enter Division
DIV_20300

Launch Cancel

Let's see a live PBS demonstration!

Aggregate for Budget

Duration: 10 minutes

Description: This demonstration shows how to run aggregation for Workforce Budget.



Let's practice how to budget for employee transfer in PBS.

Budget Aggregation

Duration: 15 minutes

Complete the following exercise in the training environment:

As a planner, user wants to run aggregation for Workforce Budget data for the unit and division he/she has Budgeted for.

- Apply the steps to search and review results.
- Apply the steps to access online help.



Lesson Key Messages

Let's wrap-up by discussing the key messages from this lesson.

1

Budget Aggregation for workforce is run by planner and is important for reconciliation of workforce data at Total level.

Workforce Planning Budget data Reconciliation

Duration: **xx** minutes

Lesson: 1 2 3 4 5 **6** 7 8

Lesson Objectives

Upon completing this lesson, you will be able to:

- Compare the data in Workforce and financials cube

Workforce Budgeting – Data Reconciliation

Workforce Planning Budget Data Reconciliation – This task is used to validate data in Workforce Cube and Financial Cube.

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Planner-> Budget -> Workforce Planning Budget Data Reconciliation

The screenshot shows the application's home screen on the left and the 'Tasks: All Task Lists' page on the right. A red arrow points from the 'Tasks' tile on the home screen to the task list page.

Home Screen: The user is logged in as 'Nikia' on 10/15/19. The 'Tasks' tile is highlighted with a red box and the number '1'. Other tiles include Financials, Projects, Workforce, Dashboards, Infolets, Data, Reports, Rules, Approvals, Application, Tools, and Academy.

Tasks: All Task Lists: The page shows a list of tasks. The 'Budget' category is expanded, and the 'Workforce Planning Budget Data Reconciliation' task is highlighted with a red box and the number '2'. The task list includes:

Name	Sta Start	End	Instructions	Action
Planner				
Forecast				
Budget				
Revenue Budget				
Workforce Budget				
Workforce Planning Budget Data Reconciliation				
Expense Budget				

Workforce Budgeting – Data Reconciliation

Workforce Planning Budget Data Reconciliation

1. After selecting the Workforce Planning Budget Data Reconciliation task from the task list, select Division.
2. Next, select Unit
3. Once the user has completed data validation, click close.

Workforce Planning Budget Data Reconciliation

Complete
 Previous
Next
Close

FY20-21
 Unit: 3011050:UCPATH CTR:PRODUCTION
Division: 20520:Chief Operating Officer

UCOP_FS_Compensation Budget

Perm Budget

	Q1 501000:Staff (Non-Student) S&W	Q2 501000:Staff (Non-Student) S&W	Q3 501000:Staff (Non-Student) S&W	Q4 501000:Staff (Non-Student) S&W	501000:Staff (Non-Student) S&W	YearTotal 508000:Composit Benefit Rate Campus Payment	FTE
19900:General Funds							42
19963:Systemwide UC Path State General Fund	3,620,253	3,620,253	3,620,253	3,620,253	14,481,012	6,082,025	244
Total Fund	3,620,253	3,620,253	3,620,253	3,620,253	14,481,012	6,082,025	286

UCOP_WF_Comp Budget

Budget

	Salary, Equity, Stipend and Car Allowance	YearTotal Benefits	YearTotal FTE
19900:General Funds			42
19963:Systemwide UC Path State General Fund	14,481,012	6,082,025	244
Total Fund	14,481,012	6,082,025	286

Let's see a live PBS demonstration!

Data Reconciliation

Duration: 10 minutes

Description: This demonstration shows how to perform data reconciliation for Workforce Budget.



Let's practice how to budget for employee transfer in PBS.

Data Reconciliation

Duration: 15 minutes

Complete the following exercise in the training environment:

As a planner, user wants to reconcile data for Workforce Budget.

- Apply the steps to search and review results.
- Apply the steps to access online help.



Lesson Key Messages

Let's wrap-up by discussing the key messages from this lesson.

1

Budget Aggregation for workforce is run by planner and is important for reconciliation of workforce data at Total level.

Workforce Reports

Duration: xx minutes

Lesson: 1 2 3 4 5 6 7 8

Lesson Objectives

Upon completing this lesson, you will be able to:

- View the Position vs FTE workforce report

Workforce Budgeting – Reports

Workforce Reports – This task is used to view Position vs FTE report for Workforce.

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Planner-> Review Reports -> Workforce Reports -> Position vs FTE Report

The screenshot shows the user interface for 'Tasks: All Task Lists'. The table below contains the following data:

Name	Sta Start	End	Instructions	Action
▼ Planner	●		i	...
▶ Forecast	●		i	...
▶ Budget	●		i	...
Budget Summary	●		i	...
▼ Review Reports	●		i	...
▶ Expense Reports	●		i	...
▼ Workforce Report	●		i	...
Position vs FTE Report	●		i	...

Workforce Reports

1. Provide the values for the prompts.

Respond to Prompts

The following prompts have been defined in the report. You may use the default values shown, or select other members.

Prompt	Selection	Type	Source
Enter Years:	FY19-20 <input type="checkbox"/> Edit Member Names	Report	Report: Position vs FTE Report Grid: Grid1
Enter Scenario:	Forecast <input type="checkbox"/> Edit Member Names	Report	Report: Position vs FTE Report Grid: Grid1
Enter Version:	Working <input type="checkbox"/> Edit Member Names	Report	Report: Position vs FTE Report Grid: Grid1
Enter Financial Unit:	3029010:UCOP LOCAL HUMAN RESOURCES OFC <input type="checkbox"/> Edit Member Names	Report	Report: Position vs FTE Report Grid: Grid1

[Help](#) [OK](#) [Cancel](#) [Reset](#)

Workforce Reports

1. A report will open in new tab.

University of California
PAYROLL Forecast DETAIL
REPORT
 Financial Unit: 3029010 UCOP LOCAL HUMAN RESOURCES OFC
 Year: FY19-20

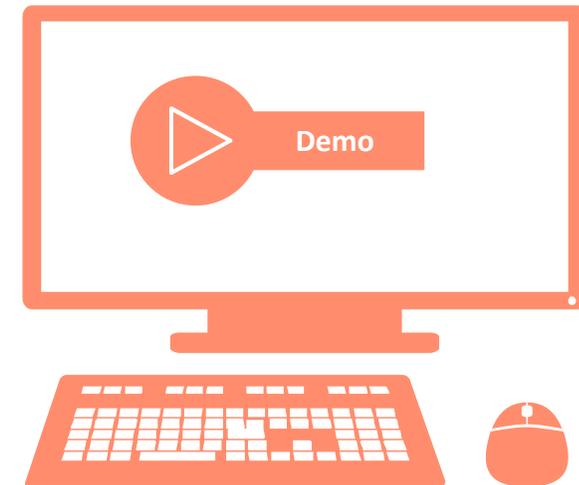
Employee	Position Number	Job Number	Fund	Distributed Salary	FTE	Start Month	Status	Total Compensation
EMP_10000373 Kirk,Venus A	Position 40001422	007597 HR GENERALIST 4	69400:Op-Common Fund		0.50	July	Active	
EMP_10000373 Kirk,Venus A	Position 40001422	007597 HR GENERALIST 4	69700:Ucrs Funds Appropriated		0.25	July	Active	
EMP_10000373 Kirk,Venus A	Position 40001422	007597 HR GENERALIST 4	69740:Employee Benefit Adm Fd		0.25	July	Active	
EMP_10031161 Wakeman,Merideth Anne	Position 40001242	000562 ORGANIZATIONAL CNSLT 4	69400:Op-Common Fund		0.50	July	Active	
EMP_10031161 Wakeman,Merideth Anne	Position 40001242	000562 ORGANIZATIONAL CNSLT 4	69700:Ucrs Funds Appropriated		0.25	July	Active	
EMP_10031161 Wakeman,Merideth Anne	Position 40001242	000562 ORGANIZATIONAL CNSLT 4	69740:Employee Benefit Adm Fd		0.25	July	Active	
EMP_10001137 Arnold,Karen Ellece	Position 40000937	000628 HR GENERALIST 5	69400:Op-Common Fund		0.50	July	Active	
EMP_10001137 Arnold,Karen Ellece	Position 40000937	000628 HR GENERALIST 5	69700:Ucrs Funds Appropriated		0.25	July	Active	
EMP_10001137 Arnold,Karen Ellece	Position 40000937	000628 HR GENERALIST 5	69740:Employee Benefit Adm Fd		0.25	July	Active	
EMP_10002677 Cannella,Greggory Frank	Position 40001723	007597 HR GENERALIST 4	69400:Op-Common Fund		0.50	July	Active	
EMP_10002677 Cannella,Greggory Frank	Position 40001723	007597 HR GENERALIST 4	69700:Ucrs Funds Appropriated		0.25	July	Active	
EMP_10002677 Cannella,Greggory Frank	Position 40001723	007597 HR GENERALIST 4	69740:Employee Benefit Adm Fd		0.25	July	Active	
EMP_10002722 Pluzdrak,Nancy Lynn	Position 40001802	000626 HR MGR 3	69400:Op-Common Fund	0.45	July	Active		

Let's see a live PBS demonstration!

Workforce Reports

Duration: 10 minutes

Description: This demonstration shows how to view Position vs FTE Workforce report.



Let's practice how to budget for employee transfer in PBS.

Workforce Report

Duration: 15 minutes

Complete the following exercise in the training environment:

As a planner, user wants to view FTE vs Position report for Workforce Budget.

- Apply the steps to search and review results.
- Apply the steps to access online help.



Workforce Budget – Reviewer

Duration: 15 minutes

Lesson:

1 2 3 4 5 6 7 8

Lesson Objectives

Upon completing this lesson, you will be able to:

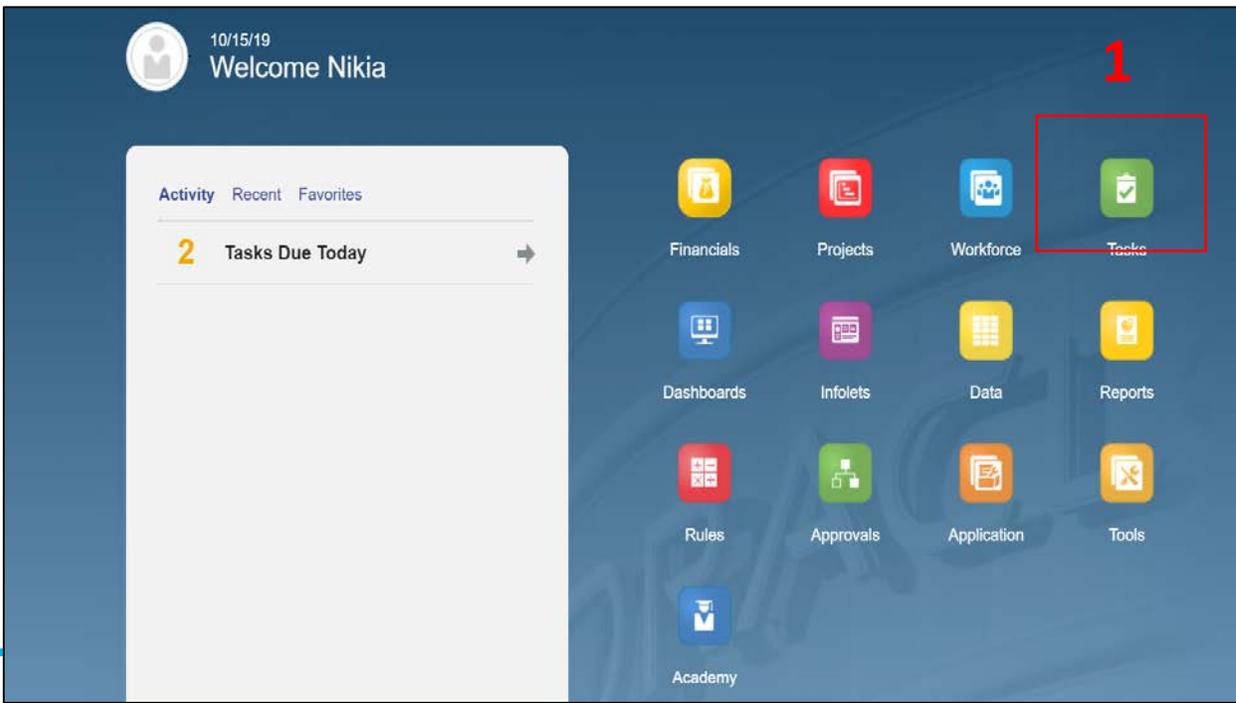
- Review Existing employees
- Review Allocations for employees
- Review Workforce Reports

Workforce Budgeting – Reviewer

Existing Employee Budget Review– The Existing Employee Budget Review task provide Reviewers ability to view details for existing employees in any unit and division combination for the budget planning year.

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Reviewer-> Budget-> Workforce Budget-> Existing Employee Budget Review



Tasks: All Task Lists

Filter: All

Name	Status	Start	End	Instructions
▼ Reviewer	●			i
▶ Budget Summary	●	11/2/19	5/29/20	i
▶ Forecast	●			i
▼ Budget	●			i
▶ Revenue Budget	●			i
▶ Expense Budget	●			i
▼ Workforce Budget	●			i
▶ Existing Employee Budget Review	●			i

The 'Existing Employee Budget Review' task is highlighted with a red box and a red number '2'.

Existing Employee Budget Review

1. After selecting the Existing Employee Budget Review task from the task list, select Unit on the Existing Employee Budget form.
2. Next, select Division
3. Once the reviewer has completed reviewing the Existing Employee Budget details, click close.

Existing Employee Budget Review ⓘ

Save Refresh Actions Complete Previous Next **Close** 3

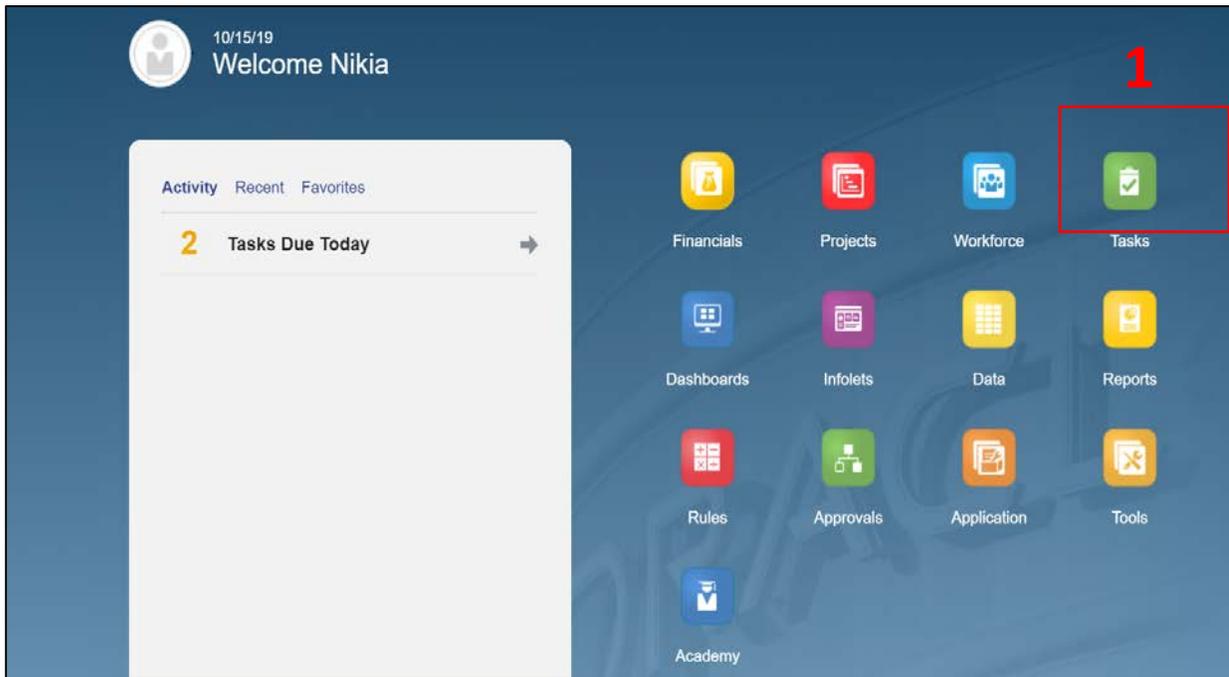
Years FY20-21 Unit 3011050:UCPATH CTR:PRODUCTION Division 20520:Chief Operating Officer

				Salary at full FTE	Distribution%	FTE	Total Compensation	Job FTE	Fi
Eagan,Maryann Santos	Position 40001747	000624 HR MGR 1	19963:Systemwide UC Path State General Fund		100%	1.00		1.00	
			Total Fund		100%	1.00			
Orozco,Aurora A	Position 40002163	000657 BUS SYS ANL 4	19963:Systemwide UC Path State General Fund		100%	1.00		1.00	
			Total Fund		100%	1.00			
Martinez,Alberto Ramon	Position 40124714	007723 BENEFITS SUPV 2	19963:Systemwide UC Path State General Fund		100%	1.00		1.00	
			Total Fund		100%	1.00			
Quinones,Jacqueline	Position 40023541	007723 BENEFITS SUPV 2	19963:Systemwide UC Path State General Fund		100%	1.00		1.00	
			Total Fund		100%	1.00			
Kaplan,Sara Michelle	Position 40002407	006941 PAYROLL SUPV 2	19963:Systemwide UC Path State General Fund		100%	1.00		1.00	
			Total Fund		100%	1.00			
McClain,Stacey	Position 40001986	007719 BENEFITS ANL 2	19963:Systemwide UC Path State General Fund		100%	1.00		1.00	
			Total Fund		100%	1.00			
Borrell,Irene	Position 40001980	006943 PAYROLL ANL 2	19963:Systemwide UC Path State General Fund		100%	1.00		1.00	
			Total Fund		100%	1.00			
Madrigal,Jesse	Position 40023511	007719 BENEFITS ANL 2	19963:Systemwide UC Path State General Fund		100%	1.00		1.00	
			Total Fund		100%	1.00			
Calderon,Alberto	Position 40002385	007595 HR GENERALIST 2	19963:Systemwide UC Path State General Fund		100%	1.00		1.00	

Employee Expense Allocation Budget Review– The Employee Expense Allocation Budget Review tasks provide Reviewers the ability to view new fund or financial unit allocation/ split for an employee (existing or new hire)

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Reviewer-> Budget-> Workforce Budget-> Employee Expense Allocation Budget Review



Name	Sta Start	End	Instructions	Action
▼ Reviewer	●		?	...
■ Budget Summary	●		?	...
▶ Forecast	●		?	...
▼ Budget	●		?	...
▶ Revenue Budget	●		?	...
▼ Workforce Budget	●		?	...
■ Existing Employee Budget Review	●		?	...
■ Employee Expense Allocation Budget Review	●		?	...
▶ Aggregate Budget	●		?	...

Employee Expense Allocation Budget Review

1. After selecting the Employee Expense Allocation Budget Review task from the task list, select Division on the Employee Expense Allocation Budget Review form.
2. Next, select Unit
3. Once the reviewer has completed reviewing the Employee Expense Allocation Budget details, click close.

Employee Expense Allocation Budget Review i

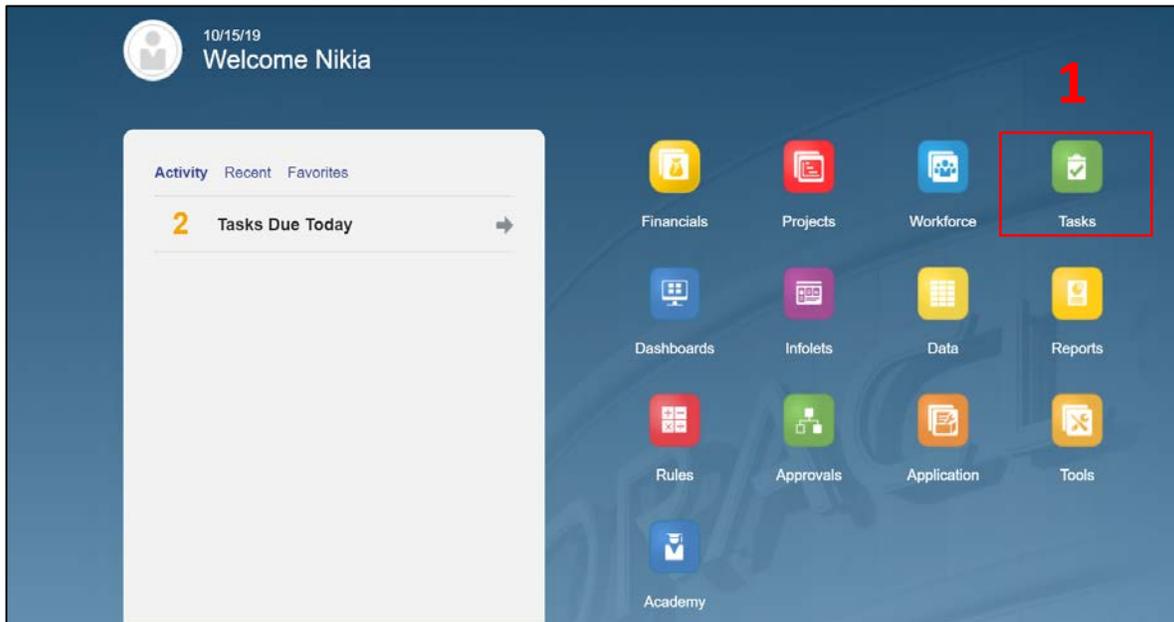
Save Refresh Actions Complete Previous Next Close

Years	Division	Unit	Distribution%	Total Employee Compensation	Salary at full FTE
FY20-21	20520:Chief Operating Officer	3011050:Ucpath Ctr:Production			
			1	2	
	ADAMS,DANA JENISE	Position 40002121 007719 BENEFITS ANL 2 19963:Systemwide UC Path State General Fund	100%		
	AHMED,HAUSA	Position 40023735 007734 GEN ACCOUNTANT 4 19963:Systemwide UC Path State General Fund	100%		
	ALLEN,ANGELLA D	Position 40001107 007584 BUS SYS ANL 3 19963:Systemwide UC Path State General Fund	100%		
	ALLISON,GAYELEA	Position 40001047 000549 ADMIN MGR 3 19963:Systemwide UC Path State General Fund	100%		
	ALMANZAR,ALAN JURGEN	Position 40001580 007595 HR GENERALIST 2 19963:Systemwide UC Path State General Fund	100%		
	ALVAREZ,NYSSA MACIEL	Position 40002388 004722 BLANK AST 3 19963:Systemwide UC Path State General Fund	100%		
	ANGEL,GRISelda	Position 40023591 007595 HR GENERALIST 2 19963:Systemwide UC Path State General Fund	100%		
	ARAGON,HILARY RUTH	Position 40023504 007719 BENEFITS ANL 2 19963:Systemwide UC Path State General Fund	100%		
	ARCHULETA,EMILY DIANE	Position 40023616 006943 PAYROLL ANL 2 19963:Systemwide UC Path State General Fund	100%		
	ARREOLA,ANDREW	Position 40001331 004722 BLANK AST 3 19963:Systemwide UC Path State General Fund	100%		
	AVILA,ISRAEL BOBADILLA	Position 40023615 006943 PAYROLL ANL 2 19963:Systemwide UC Path State General Fund	100%		
	BADILLO,AARON	Position 40001988 007719 BENEFITS ANL 2 19963:Systemwide UC Path State General Fund	100%		
	BALL,ASHLEY	Position 40002257 006943 PAYROLL ANL 2 19963:Systemwide UC Path State General Fund	100%		
	BARAJAS,MATTHEW JACOB	Position 40023610 006943 PAYROLL ANL 2 19963:Systemwide UC Path State General Fund	100%		
	BARRAZA,KAREN ROCIO	Position 40023613 006943 PAYROLL ANL 2 19963:Systemwide UC Path State General Fund	100%		

Aggregate Budget – The Aggregate Budget tasks provide Reviewers the ability to aggregate the workforce data for Budget to parent level members.

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Reviewer -> Budget-> Workforce Budget-> Aggregate Budget



Name	Sta Start	End	Instructions	Action
▼ Reviewer	●		i	...
■ Budget Summary	●		i	...
▶ Forecast	●		i	...
▼ Budget	●		i	...
▶ Revenue Budget	●		i	...
▼ Workforce Budget	●		i	...
■ Existing Employee Budget Review	●		i	...
■ Employee Expense Allocation Budget Review	●		i	...
+ Aggregate Budget	●		i	...

Aggregate Budget

1. Click on Launch after opening the task.

Aggregate Budget

Cube OEP_WFP
Business Rule UCOP_Aggregate_Budget

Launch 1

Complete Previous Next Close

2. Select the Unit and Division from the Hierarchy selection and click on Launch.

UCOP_Aggregate_Budget

* Unit
"OEP_No Entity"

* Enter Division
DIV_20300

Launch 2 Cancel

Workforce Budgeting – Reviewer

Workforce Planning Budget Data Reconciliation – This task is used to validate data in Workforce Cube and Financial Cube.

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Reviewer -> Budget -> Workforce Planning Budget Data Reconciliation

The screenshot shows the user interface for 'Tasks: All Task Lists'. The table contains the following data:

Name	Sta Start	End	Instructions	Action
▶ Forecast	●		i	...
▼ Budget	●		i	...
▶ Revenue Budget	●		i	...
▶ Workforce Budget	●		i	...
▶ Workforce Planning Budget Data Reconciliation	●		i	...
▶ Expense Budget	●		i	...
Submit Budget	●		i	...
▼ Review Reports	●		i	...
Regents Schedule	●		i	...

Workforce Budgeting – Reviewer

Workforce Planning Budget Data Reconciliation

1. After selecting the Workforce Planning Budget Data Reconciliation task from the task list, select Division.
2. Next, select Unit
3. Once the user has completed data validation, click close.

Workforce Planning Budget Data Reconciliation

Complete
 Previous
Next
Close

FY20-21
 Unit: 3011050:UCPATH CTR:PRODUCTION
Division: 20520:Chief Operating Officer

UCOP_FS_Compensation Budget

Perm Budget

	Q1 501000:Staff (Non-Student) S&W	Q2 501000:Staff (Non-Student) S&W	Q3 501000:Staff (Non-Student) S&W	Q4 501000:Staff (Non-Student) S&W	501000:Staff (Non-Student) S&W	YearTotal 508000:Composit Benefit Rate Campus Payment	FTE
19900:General Funds							42
19963:Systemwide UC Path State General Fund	3,620,253	3,620,253	3,620,253	3,620,253	14,481,012	6,082,025	244
Total Fund	3,620,253	3,620,253	3,620,253	3,620,253	14,481,012	6,082,025	286

UCOP_WF_Comp Budget

Budget

	Salary, Equity, Stipend and Car Allowance	YearTotal Benefits	YearTotal FTE
19900:General Funds			42
19963:Systemwide UC Path State General Fund	14,481,012	6,082,025	244
Total Fund	14,481,012	6,082,025	286

Workforce Budgeting – Reviewer

Workforce Reports – This task is used to view Position vs FTE report for Workforce.

Navigation:

1. Access Tasks tile from the home screen.
2. From Task List page, go to Reviewer -> Review Reports -> Workforce Reports -> Position vs FTE Report

The screenshot displays the Deloitte system interface. On the left, the home screen shows a grid of application tiles. The 'Tasks' tile, represented by a green icon with a checkmark, is highlighted with a red box and the number '1'. A red arrow points from this tile to the right pane. The right pane shows the 'Tasks: All Task Lists' page, which contains a table of tasks. The 'FTE vs Position Report' task is highlighted with a red box and the number '2'.

Name	Sta	Start	End	Instructions	Action
▼ Reviewer					
Budget Summary					
▶ Forecast					
▶ Budget					
▼ Review Reports					
Regents Schedule					
▼ Workforce Reports					
FTE vs Position Report					

Workforce Reports

1. Provide the values for the prompts.

Respond to Prompts [X]

The following prompts have been defined in the report. You may use the default values shown, or select other members.

Prompt	Selection	Type	Source
Enter Years:	FY19-20 <input type="checkbox"/> Edit Member Names	Report	Report: Position vs FTE Report Grid: Grid1
Enter Scenario:	Forecast <input type="checkbox"/> Edit Member Names	Report	Report: Position vs FTE Report Grid: Grid1
Enter Version:	Working <input type="checkbox"/> Edit Member Names	Report	Report: Position vs FTE Report Grid: Grid1
Enter Financial Unit:	3029010:UCOP LOCAL HUMAN RESOURCES OFC <input type="checkbox"/> Edit Member Names	Report	Report: Position vs FTE Report Grid: Grid1

[Help](#) [OK](#) [Cancel](#) [Reset](#)

Workforce Budgeting – Reviewer



Workforce Reports

1. A report will open in new tab.

University of California
PAYROLL Forecast DETAIL
REPORT

Financial Unit: 3029010 UCOP LOCAL HUMAN RESOURCES OFC
 Year: FY19-20

Employee	Position Number	Job Number	Fund	Distributed Salary	FTE	Start Month	Status	Total Compensation
EMP_10000373 Kirk,Venus A	Position 40001422	007597 HR GENERALIST 4	69400:Op-Common Fund		0.50	July	Active	
EMP_10000373 Kirk,Venus A	Position 40001422	007597 HR GENERALIST 4	69700:Ucrs Funds Appropriated		0.25	July	Active	
EMP_10000373 Kirk,Venus A	Position 40001422	007597 HR GENERALIST 4	69740:Employee Benefit Adm Fd		0.25	July	Active	
EMP_10031161 Wakeman,Merideth Anne	Position 40001242	000562 ORGANIZATIONAL CNSLT 4	69400:Op-Common Fund		0.50	July	Active	
EMP_10031161 Wakeman,Merideth Anne	Position 40001242	000562 ORGANIZATIONAL CNSLT 4	69700:Ucrs Funds Appropriated		0.25	July	Active	
EMP_10031161 Wakeman,Merideth Anne	Position 40001242	000562 ORGANIZATIONAL CNSLT 4	69740:Employee Benefit Adm Fd		0.25	July	Active	
EMP_10001137 Arnold,Karen Ellece	Position 40000937	000628 HR GENERALIST 5	69400:Op-Common Fund		0.50	July	Active	
EMP_10001137 Arnold,Karen Ellece	Position 40000937	000628 HR GENERALIST 5	69700:Ucrs Funds Appropriated		0.25	July	Active	
EMP_10001137 Arnold,Karen Ellece	Position 40000937	000628 HR GENERALIST 5	69740:Employee Benefit Adm Fd		0.25	July	Active	
EMP_10002677 Cannella,Greggory Frank	Position 40001723	007597 HR GENERALIST 4	69400:Op-Common Fund		0.50	July	Active	
EMP_10002677 Cannella,Greggory Frank	Position 40001723	007597 HR GENERALIST 4	69700:Ucrs Funds Appropriated		0.25	July	Active	
EMP_10002677 Cannella,Greggory Frank	Position 40001723	007597 HR GENERALIST 4	69740:Employee Benefit Adm Fd		0.25	July	Active	
EMP_10002722 Pluzdrak,Nancy Lynn	Position 40001802	000626 HR MGR 3	69400:Op-Common Fund		0.45	July	Active	

Lesson Key Messages

Let's wrap-up by discussing the key messages from this lesson.

- 1 Reviewers can review existing employees, and allocations and reports.

Let's wrap-up by discussing the key messages from this course.

1

With the introduction of PBS, Reviewers have visibility to where costs come from (Unit assigned to an employee) and how many employees are charging to that specific Unit.

2

The Point Of View Setup capability allows Planners to easily configure their dimensions for the particular planning or reviewing activity they want to undertake.

3

The Labor Allocations capability allows users to assign employees to Unit and Fund so that the expenses can be planned and recorded accurately.

4

Budgeting for new hires is the process of creating hiring requisitions and allocating expenses from the workforce budget to the newly added requisitions.

Any Questions?

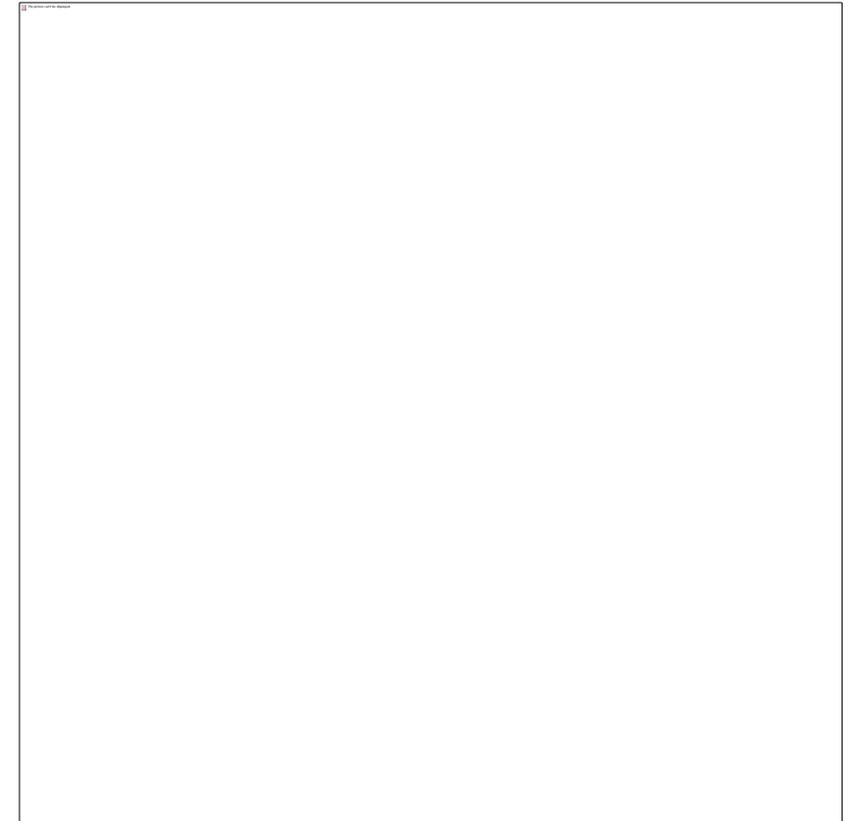
Do you have any questions?



Contact Us: In case of questions, please reach out to Nicole Terrell, Nicole.Terrell@ucop.edu



Reference Materials: All learning materials for this course are stored at <https://www.ucop.edu/fsr>



Thank you!

