



Paperless Budget Development Training Manual

Department	Office of Fiscal Planning and Analysis
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Document Authors	J. Whitten

What is Office of Fiscal Planning and Analysis?

Mission

The Office of Fiscal Planning and Analysis (OFPA) supports the strategic mission of the University by preparing, managing, and implementing the University's annual operating budget for general and auxiliary funds. We assist academic and administrative support units in budget preparation and execution while providing timely and accurate financial information to the Mississippi Institute of Higher Learning (IHL) and the Legislative Budget Office (LBO). We provide forecasting models and other financial analyses that are used to support resource allocation decisions. OFPA strives to deliver excellent customer service, education and guidance on best practices related to budgeting and financial management throughout the University.

Vision

The Office of Fiscal Planning and Analysis will be a proactive and integral partner in the implementation of the University's strategic plan by providing timely, accurate and complete analytical services related to financial planning, forecasting and decision support in resource allocation and development.

Who do I contact if I have questions?

Go to <u>https://www.usm.edu/fiscal-planning-analysis/</u> for up-to-date contact information. Contact OFPA with questions at <u>budgets@usm.edu</u>.

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Logging into SOARHR

- 1. Go to soarhr.usm.edu in your web browser.
- 2. Type in User ID. It will be your emplid with the "W".
- 3. Type in your Password.
- 4. Click Sign In.

Instructions for Budget Development - *Save your changes as you go*

- 1. Go to Nav Bar (Compass Icon) > Navigator > USM Budget Menu > Use > Budget Entry
- 2. Enter Fund Code, USM Financials Department, and Program Code.
- 3. Enter the appropriate budget period.
- 4. Click Search to open the budget development page.

USM BUD BAL PL DEV	
Enter any information you have and click Search. Leave fields	s blank for a list of all values.
Find an Existing Value Add a New Value	
▼ Search Criteria	
Set ID begins with 🗸	Q
Fund Code begins with 🗸	Q
USM Financials Department begins with 🗸	Q
Program Code begins with 🗸	Q
USM Budget Period YYYY begins with 🗸	
_	
Search Clear Basic Search 🖾 Save Search	Criteria
Find an Existing Value Add a New Value	

Usm Bud B	al PI Dev									
Ledger	: ORG_BD	USM Bu	idget Balance Pa	anel	Se	et ID: USM01				
Budget Period YYYY: 2023 Fund Code: 10H10 Department: 110012 Budget Development Training Program Code: 01001										
١	View/Update Salary Information Create New Position									
Budget Personalize Find Find First 1-6 of 6 Accounts Image: Account of the second										
*Account	Seq Desc	ription	Current Budget	Incr/Decr	New FY Budget	Comments				
SALARY	1 Salaries		\$150,000.00		\$150,000.00		4			
WAGES	2 Wages		\$10,000.00		\$10,000.00		4			
FRINGE	3 Fringe Bene	fits	\$50,000.00	\$12,948.00	\$62,948.00		<i>li</i> +			
CONTSV	5 Contractual	Services	\$10,000.00		\$10,000.00		1. +			
COMMOD	6 Commoditie	s	\$20,000.00		\$20,000.00		<i>li</i> 🛨			
EQUIP	9 Equipment		\$10,000.00		\$10,000.00		4			
	Add Attachment			Send	to Workflow					

5. Open the View/Update Salary Information link to view salaries and make any changes.

View/Update Salary Information

6. If applicable, enter the appropriate amount in the increase/decrease column for each position. A comment is required for any changes made. These comments will be used by OFPA.

	Personalize Find View All 🖉 🌉											First 🕚 1-6 of 6 🛞 Last			
Prin	t r Empl ID	Name	Title	Pos #	Faculty Rank	FTE	Months	Wage	Beginning Budget	Present Salary	Increase/Decrease	Proposed Salary	Split Salary	Position Notes	Comment
1 1.	0 10012145	Bridgerton, Daphne	Director	00007197	6	1.00	12		\$50,000.00	\$50,000.00	\$-5,000.00	\$45,000.00			Salary Decrease Example 🦼
2 2.	897489	Bridgerton,Anthony	Associate Director	00007198	6	1.00	12		\$40,000.00	\$40,000.00	\$1,000.00	\$41,000.00			Salary Increase Example 🖌
3 3.	695898	Whistledown,Lady	Journalist	00007199	6	1.00	12		\$20,000.00	\$20,000.00		\$20,000.00			
4 4.	231547	Featherington, Penelope	Researcher	00007200	6	1.00	12		\$20,000.00	\$20,000.00		\$20,000.00			
5 5.	987847	Sharma,Kate	Executive Assistant	00007201	6	1.00	12		\$20,000.00	\$20,000.00		\$20,000.00			
6 6.)		Miscellaneous, Student	00007202		0.50		1	\$10,000.00	\$10,000.00	\$2,000.00	\$12,000.00			Wage Increase Example

7. Any salary or wage changes will appear on the main page under the increase/decrease column. Fringe will be adjusted based on the salary and wage changes.

		Budge Accou	et Ints	Personalize Find 🗖 📑	First ④ 1-6 of 6
*Account	Seq Description	Current Budget	Incr/Decr	New FY Budget	Comments
SALARY	1 Salaries	\$150,000.00	\$-4,000.00	\$146,000.00	4 +
WAGES	2 Wages	\$10,000.00	\$2,000.00	\$12,000.00	4
FRINGE	3 Fringe Benefits	\$50,000.00	\$11,925.00	\$61,925.00	// 🛨
CONTSV	5 Contractual Services	\$10,000.00		\$10,000.00	11 +
COMMOD	6 Commodities	\$20,000.00		\$20,000.00	4
EQUIP	9 Equipment	\$10,000.00		\$10,000.00	// 🛨
/	Add Attachment		Send	to Workflow	

8. Changes for operating accounts can be made on the main budget development page. A comment is required for each account change.

		Budget Accounts	Personalize Find 🔄 📑 First 🕢 1-6 of 6
*Account	Seq Description	Current Budget Incr/Decr	New FY Budget Comments
SALARY	1 Salaries	\$150,000.00 \$-4,000.00	\$146,000.00 🕢 🖌
WAGES	2 Wages	\$10,000.00 \$2,000.00	\$12,000.00
FRINGE	3 Fringe Benefits	\$50,000.00 \$11,925.00	\$61,925.00
CONTSV	5 Contractual Services	\$10,000.00 \$-5,000.00	\$5,000.00 CONTSV example
COMMOD	6 Commodities	\$20,000.00 \$5,000.00	\$25,000.00 COMMOD example 🔗 🕂
EQUIP	9 Equipment	\$10,000.00	\$10,000.00

9. Attachments can be added to the budget development page. The attachments will be available for viewing by budget authorities (during routing) and OFPA. Multiple attachments may be uploaded.

Upload Attachments		Help
Message		
File names cannot exceed 40 cha	racters.	
File Box		
File Name	Personalize Find First 1 of 1 Last View Attachment Upload File View Attachment Upload File Image: Compare the second sec	t]

- 10. The "Create New Position" section should only be used under one of the following circumstances:
 - a. A new position is being added to the budget (new funds) and has been previously approved by your respective Vice President.
 - b. You are moving funds from an existing position into a newly created position that isn't listed on your current Salary/Wage report.

If one of these applies, please click the 'Create New Position' button, and follow the instructions for the required information.



You will need to provide Position Title, FTE, No. of Months, Salary, and Funding Source(s) in the comment box for OFPA. Once you have this information entered, click OK to save.

 This section should only be used under one of the following circumstances: 1. A new position is being added to the budget (new funds) and has been previous approved by your respective Vice President. 2. You are moving funds from an existing position into a newly created position isn't listed on your current Salary/Wage report. 	ously that
*In both situations above, a new job description may be needed. Contact yo Partner to ask this question.	our HR
Please provide the following information:	
Position Title, FTE, No. of Months, Salary, and Funding Source(s)	
1	
OK Cancel	

		Bu	dget counts	Personalize Find 🗗	🛛 🛛 🔣 🛛 First	First ④ 1-7 of 7 Last	
*Account	Seq Description	Current Budget	Incr/Decr	New FY Budget	Comments	\frown	
SALARY	1 Salaries	\$160,680.00		\$160,680.00		_/ +	
WAGES	2 Wages	\$0.00		\$0.00		Đ	
FRINGE	3 Fringe Benefits	\$54,246.00	\$67.00	\$54,313.00		<i>•</i> •	
TRAVEL	4 Travel and Subsistence	\$0.00		\$0.00		<i>~</i> 🛨	
CONTSV	5 Contractual Services	\$3,000.00		\$3,000.00		<i>*</i> 🛨	
COMMOD	6 Commodities	\$2,500.00		\$2,500.00			
NMXFRS	11 Nonmandatory Transfers	\$0.00		\$0.00		_/+	
	Add Attachment		Send	d to Workflow		V	

11. To add a new operating account, click the plus sign next to one of the existing accounts:

Enter the new account needed, budget amount, and a comment explaining the new account needed.

			Bu	dget counts	Personalize 1	Find 🔁 🔜	First ④ 1-8 of 8
*Account	Seq De	scription	Current Budget	Incr/Decr	New FY Bud	get Com	ments
SALARY	1 Salaries		\$160,680.00		\$160,680	.00	4 +
WAGES	2 Wages		\$0.00		\$0.	.00	4
FRINGE	3 Fringe B	enefits	\$54,246.00	\$67.00	\$54,313	.00	4
TRAVEL	4 Travel ar	nd Subsistence	\$0.00		\$0.	.00	4
CONTSV	5 Contract	ual Services	\$3,000.00		\$3,000	.00	4
COMMOD	6 Commo	lities	\$2,500.00		\$2,500	.00	4
NMXFRS	11 Nonman Transfers	datory s	\$0.00		\$0.	.00	<i>li</i> 🛨
Q			\$0.00		\$0	.00	4 🛨 🗄
A	Add Attachment			Send	to Workflow		

After you have entered the required information, the row should look like the following example:

EQUIP 9 Equipment \$0.00 \$500.00 New account example	+ -
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12. If you would like to download or print an excel spreadsheet of the budget information for your records, click the 'download budget accounts to excel' button (circled below). An excel will download to your computer.

Ledger: ORG_BD	USM E	Budget Balance Pa	nel	S	Set ID: USM01			
Budget Period YYYY: 2023								
Fund Code: 10H10 Dep	artment: 110	012 Bu	dget Develo	pment Training	Program Cod	e: 01001		
View/Update Salary	Information		Create New Position					
Budget Personalize Find] First () 1-6 of 6 Accounts () () () () ()								
*Account Seq Des	<u>cription</u>	Current Budget	Incr/Decr	New FY Budget	Comments	5		

The information from the budget entry page will download to excel for your records. See below.

А	В	С	D	E	F	G
*Account	Seq	Description	Current Budget	Incr/Decr	New FY Budget	Comments
SALARY	1	Salaries	\$150,000.00		\$150,000.00	
WAGES	2	Wages	\$10,000.00		\$10,000.00	
FRINGE	3	Fringe Benefits	\$50,000.00	\$12,950.00	\$62,950.00	
CONTSV	5	Contractual Services	\$10,000.00		\$10,000.00	
COMMOD	6	Commodities	\$20,000.00		\$20,000.00	
EQUIP	9	Equipment	\$10,000.00		\$10,000.00	

An excel may also be downloaded for the View/Update Salary Information page by clicking the download excel button.

													Personaliz	te Find View All 🖉 🔣	First 🕢 1-6 of 6 🕑 L
Prir Orde	t Empl ID	Name	Title	Pos #	Faculty Rank	FTE	Months	Wage	Beginning Budget	Present Salary	Increase/Decrease	Proposed Salary	Split Salary	Position Notes	Comment
1.	0 10012145	Bridgerton, Daphne	Director	00007197	6	1.00	12		\$50,000.00	\$50,000.00	\$-1,000.00	\$49,000.00			Salary Decrease Example
2.	0 897489	Bridgerton, Anthony	Associate Director	00007198	6	1.00	12		\$40,000.00	\$40,000.00	\$1,000.00	\$41,000.00			Salary Increase Example
3.	0 695898	Whistledown,Lady	Journalist	00007199	6	1.00	12		\$20,000.00	\$20,000.00		\$20,000.00			
4.	0 231547	Featherington, Penelope	Researcher	00007200	6	1.00	12		\$20,000.00	\$20,000.00		\$20,000.00			
5.	987847	Sharma,Kate	Executive Assistant	00007201	6	1.00	12		\$20,000.00	\$20,000.00		\$20,000.00			
6.	С		Miscellaneous, Student	00007202		0.50			\$10,000.00	\$10,000.00		\$10,000.00			

Instructions for Sending Budget Form to Workflow

- 1. Once all changes have been made to the budget form, you will need to send to workflow for budget authority and OFPA approval.
- 2. Click the 'Send to Workflow' button on the main budget form page.



3. Once the budget form has entered workflow, changes cannot be made unless the form is denied back to the requestor. After clicking 'send to workflow', the fields will be grayed out as shown below.

Ledger: ORG_BD USM Budge			Balance Panel		Set ID: USM01		
Budget Per	iod YYYY: 2023						
Fund Code:	10H10 Depart	ment: 110012	Budge	t Develop	oment Training	Program Code:	01001
Vi	ew/Update Salary Info	ormation			Create New Position		
			Budget Account	ts	Personalize Find 🔄	📑 First 🕢	1-6 of 6
*Account	Seq Descrip	tion Curre	nt Budget	Incr/Decr	New FY Budget	Comments	
SALARY	1 Salaries	\$1	50,000.00		\$150,000.00		
WAGES	2 Wages	s	10,000.00		\$10,000.00		
FRINGE	3 Fringe Benefits	s \$	50,000.00 \$1	2,950.00	\$62,950.00		
CONTSV	5 Contractual Se	ervices \$	10,000.00		\$10,000.00		
COMMOD	6 Commodities	\$:	20,000.00		\$20,000.00		
EQUIP	9 Equipment	\$	10,000.00		\$10,000.00		
ŀ	Add Attachment			Send t	to Workflow		

4. You will be able to view the workflow routing map by clicking 'Return to Search' and opening the budget entry page again.

You may click on 'Multiple Approvers' to see where the form routed.

Budget Approval	
SETID=USM01, DEPTID=110012, FUND_CODE=10H10, USM_FIN_DEPARTMENT=110012, PROGRAM_CODE=06000, USM_BUDGET_PERIOD=2023, LEDGER=ORG_BD:Pending	
Budget Approval 3	
Pending Multiple Approvers Budget Approvers 2	
Budget Approval	
SETID=USM01, DEPTID=110012, FUND_CODE=10H10, USM_FIN_DEPARTMENT=110012, PROGRAM_CODE=06000, USM_BUDGET_PERIOD=2023, LEDGER=ORG_BD:Awaiting Further Appro	/als
Budget Approval	
Not Routed Multiple Approvers Final Budget Approval	

5. Workflow emails will be generated at each level of approval to notify the budget authorities that the form has entered their worklist. Only one budget authority is required to approve the form at each level.

Should a budget authority deny the form, the budget developer will receive a denial email. The budget developer will be required to work the budget form again and send through workflow.

Instructions for Approving or Denying Budget Forms in Workflow

Budget approvers will receive a workflow email notification for each budget form that has routed to their worklist. If there are multiple approvers on one level, only one approver needs to approve/deny the form for it to route to the next step.

- 1. To view the forms pending your approval, login to SoarHR.
- 2. Click Navigator Worklist Worklist to view your pending worklist items.
- 3. Pending budget forms will appear with a USM_BUD_DEV link.

Whitten,Jessica Lynn 03/29/2022 Approval Routing Approval Workflow V USM BUD DEV.5, USM BUD DEV.2 03/08, N, 0, SETID-USM01 DEPTID:110 FUND CODE:100100 USM BUD CODE:100100 FUND CODE:100100 USM BUD CODE:06000 USM BUDCET_PERIOD:2023 LEDGER ORG BD RDC:RA,0,A,	D_DEV, 2022- EPTID:110012 2012 3 2, <u>A</u> ,	<u>VI BUD DEV, 2022</u> 101 DEPTID:11001: <u>VT:110012</u> 00 D:2023 D:2023 D:RA,0,A,	✓ USM BUD DEV.5. USN 03-08, N. 0, SETID: USM UND CODE: 10H10 USM FIN: DEPARTMEN PROGRAM. CODE: 0600 USM BUDGET. PERIOI LEDGER: ORG_BD RD(Approval Workflow	Approval Routing	03/29/2022	Whitten,Jessica Lynn
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4. Approvers will be able to view changes to the operating accounts and the salary information. To view the salary information, click on 'View/Update Salary information'.

Ledger: ORG_BD	USM Budget Ba	alance Panel		Set ID: USM01
Budget Period YYYY: 2023				
Fund Code: 10H10 Depart	ment: 110012	Budget Deve	elopment Training	Program Code: 01001
View/Update Salary Infe	ormation		Create New Pos	ition

5. The salary information page will open and allow the approver to view all changes made and comments.

												\frown		Personaliz	e Find View All 🔄 📑	First 🕢 1-6 of 6 🕑 Last
	Print Order	Empl ID	Name	Title	Pos #	Faculty Rank	FTE	Months	Wage	Beginning Budget	Present Salary	increase/Decrease	Proposed Salary	Split Salary	Position Notes	Comment
1	1.0 1	10012145	Bridgerton, Daphne	Director	00007197	6	1.00	12		\$50,000.00	\$50,000.00	\$-1,000.00	\$49,000.00			Salary Decrease Example
2	2.0 8	397489	Bridgerton, Anthony	Associate Director	00007198	6	1.00	12		\$40,000.00	\$40,00000	\$1,000.00	\$11,000.00			Salary Increase Example
3	3.0 6	695898	Whistledown,Lady	Journalist	00007199	6	1.00	12		\$20,000.00	\$20,000 00		\$20,000.00			
4	4.0 2	231547	Featherington, Penelope	Researcher	00007200	6	1.00	12		\$20,000.00	\$20,000.00		\$20,000.00			
5	5.0 9	987847	Sharma,Kate	Executive Assistant	00007201	6	1.00	12		\$20,000.00	\$20,000.0		\$20,000.00			
6	6.0			Miscellaneous, Student	00007202		0.50			\$10,000.00	\$10,000.00	\setminus /	\$10,000.00			
												\sim				

6. Changes to the operating accounts will appear on the main budget form page.

			Bud	get ounts	Personalize Find 🔄	First 🕢	1-5 of 5
*Account	Seq	Description	Current Budget	Incr/Decr	New FY Budget	Comments	
SALARY	1 Sala	ries	\$237,821.00	\$4,000.00	\$241,821.00		
WAGES	2 Wag	es	\$3,615.00		\$3,615.00		
FRINGE	3 Fring	ge Benefits	\$79,921.00	\$749.00	\$80,670.00		
CONTSV	5 Con	tractual Services	\$1,000.00	\$-500.00	\$500.00 test		
COMMOD	6 Com	modities	\$1,000.00	\$500.00	\$1,500.00 test		

 Budget approvers will be able to view attachments and new position requests before approving or denying the form. In the top right corner of the form, links will appear only if this information has been added by the budget developer.
 Click on the link(c) to view:

Click on the link(s) to view:



8. After reviewing all form changes and any attachments/requests, the budget approver will either approve or deny the form.

Approve	Deny

6. <u>**To approve**</u> – click the approve button on the budget form page. This will route the form to the next level of approval.

You will be able to view the updated workflow routing map by clicking 'Return to Search' and opening the budget entry page again. At this point you should see your approval marked green.

Budge	et Approval
	SETID=USM01, DEPTID=110012, FUND_CODE=10H10, USM_FIN_DEPARTM
Bu	dget Approval 3
Pool	Pending Maskew,Bridget Lynn Budget Approvers 1 04/01/22 - 2:07 PM Pending Easterwood,Allyson G Budget Approvers 2
Budge	et Approval
	SETID=USM01, DEPTID=110012, FUND_CODE=10H10, USM_FIN_DEPARTMI
Bu	dget Approval
N	Iot Routed Multiple Approvers Final Budget Approval

 <u>To deny</u> – click the deny button on the budget form page. This will route the form back to the budget developer(s). You will need to enter a comment for the denial to explain what modifications are needed on the form. This comment will be visible for the budget developer to view and correct the form.

You will be able to view the updated workflow routing map by clicking 'Return to Search' and opening the budget entry page again. At this point you should see your box marked red and denied.

	Denial Comments
t	iesting
Budge	t Approval
	SETID=USM01, DEPTID=130001, FUND_CODE=10H10, USM_FIN_DEPARTMEN
Bud	get Approval 3
A	Deproved Denied Cochran, Jacob McNair Easterwood, Allyson G Budget Approvers 1 Budget Approvers 2 03/30/22 - 9:13 AM 03/30/22 - 9:14 AM
	Comment History
Budge	t Approval
-	SETID=USM01, DEPTID=130001, FUND_CODE=10H10, USM_FIN_DEPARTMEN
Bud	get Approval
Te	Multiple Approvers Final Budget Approval
	Comment History

The budget developer will receive a denial email and is required to open the budget form for corrections and send back to workflow.