UNIVERSITY OF MONTANA

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FinanceHUB Labor Planning Guide

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Acronyms to note: BPA stands for Budget, Planning and Analysis Office.

Icon Index:

Waffle Icon

Hamburger Stack

Bell Notification

In order: File Attachments, Messages, Tools

Labor Planning:

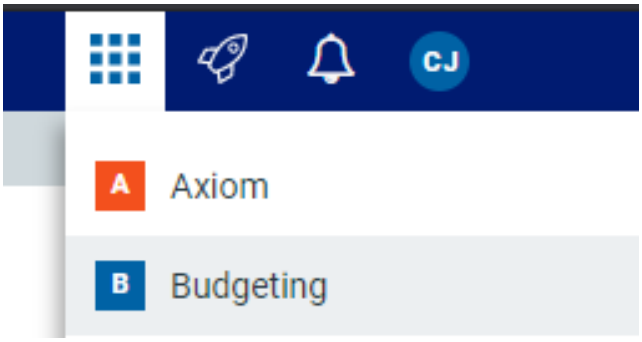
Important: There is not a submit button within the Labor Planfiles. Labor feeds into the Budget Planfiles. Submitting a Budget Planfile means you approve the underlying labor plan. Make sure your Labor Planfile is complete before submitting the Budget Planfile.

Login to FinanceHUB. https://umt.axiom.cloud/.

From the FinanceHUB home page, open the Budgeting module by clicking on the waffle icon in the upper right-hand corner of the screen. Select Labor Planning.

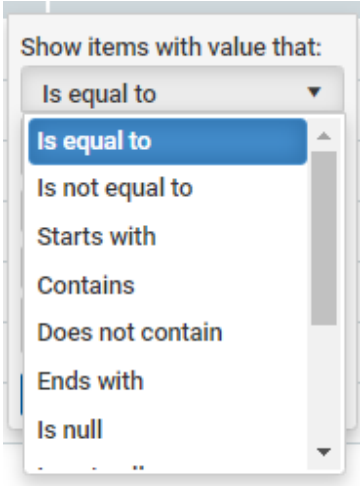
COMMENTS: entering comments throughout your Planfile in the position cards or on pooled positions is a good idea. We have reports that show the comment.

Navigation:



- The Labor Planning tab, by default, will show all of the Planfiles for which you have access.

- If you have multiple labor Planfiles and you would like to filter your list, click on the icon.
- Select the drop down below, “Show items with value that:”



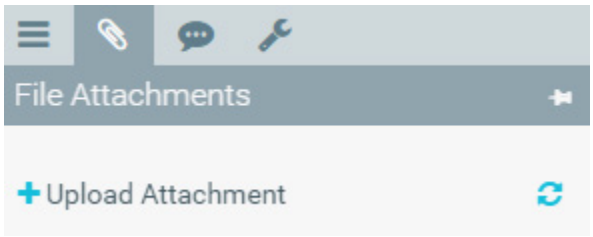
The most common use here is to select “Contains”. You can then type in one word you know exists in your Level 3 Org. For example, you can type in Business and all the Planfiles with the word Business in the title will show up.

- NOTE: To clear the filter click “clear”.
- Navigate to the desired Planfile, open it by clicking on the icon.

Labor Planfile Tools:

Upload Attachments:

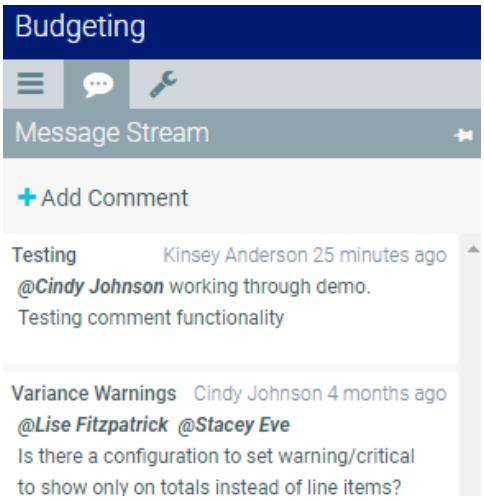
- You will notice the grey band has added the icon. This icon will allow you to attach documents directly to the Planfile. It is only visible to those who have access to the Planfile.



- To upload a file, click on the icon, navigate to the file you wish to upload, click open and then okay.

- Once a document is attached to the Planfile, it is downloadable by others by clicking the icon.
- NOTE: It becomes a static document once it is attached to the Planfile, so if changes are made to the document, a new copy will need to be uploaded to the Planfile.
- To delete the file, click the icon and then click OK.

Message Stream:

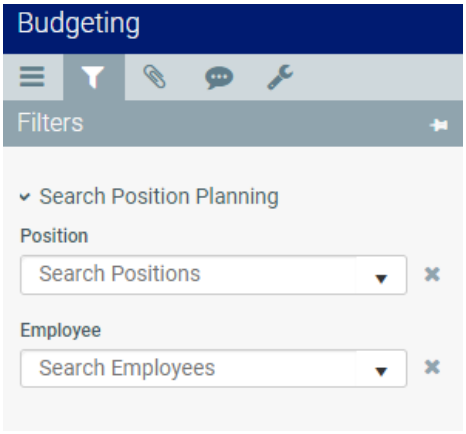


- Within the Labor Planfile, the light grey band will display the message stream.
- This message stream can only be seen by others who have access to that particular Planfile.
- To add a message, click “Add Comment”.
- Within the message, you can add a title, compose a message and tag a user.
- If you tag a user, that user will get a notification under the bell icon.

Filtering using the Funnel:

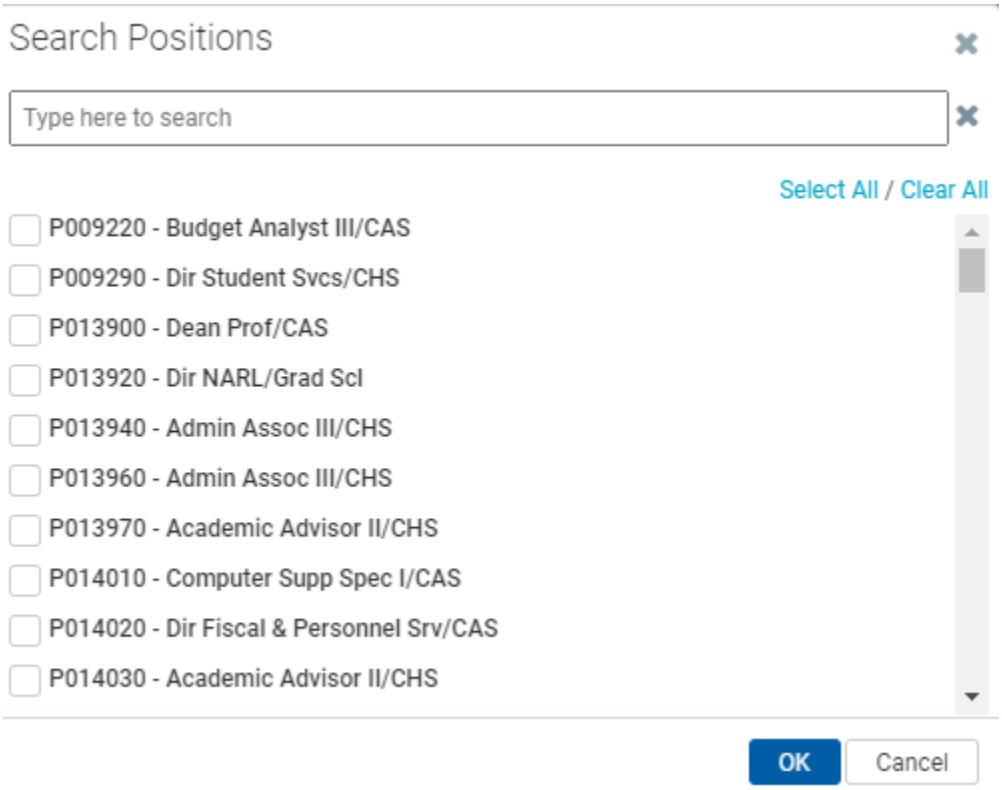
Position and Employees Filter:

- If you have a long list of positions on the Position Planning tab and you wish to filter by position number or employee, you can do so by clicking on the icon.

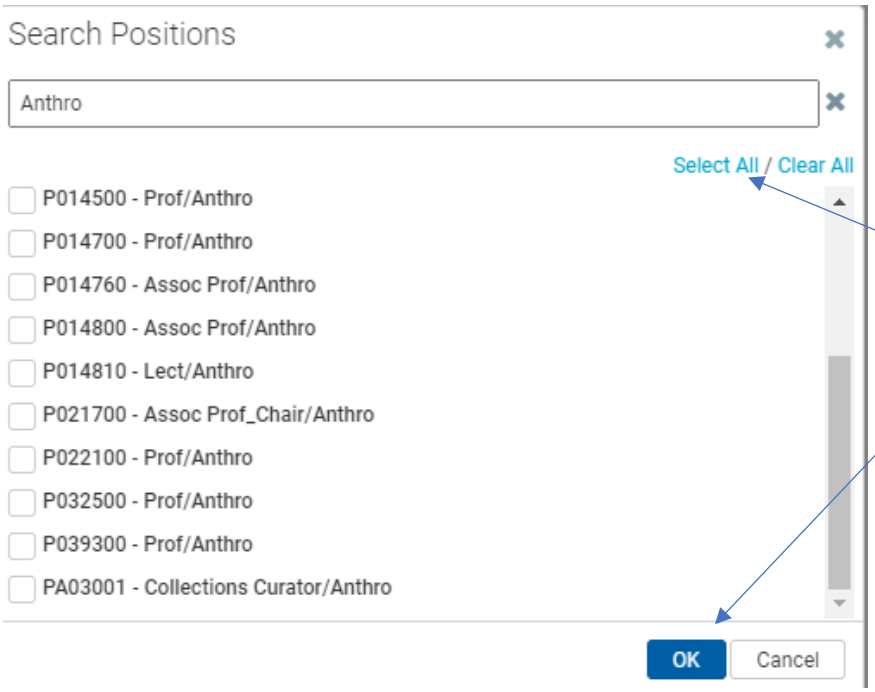


To see several positions, you can search all positions that have a specific word or abbreviation in the position title.

- Click on the ▼ in the Search Positions field.

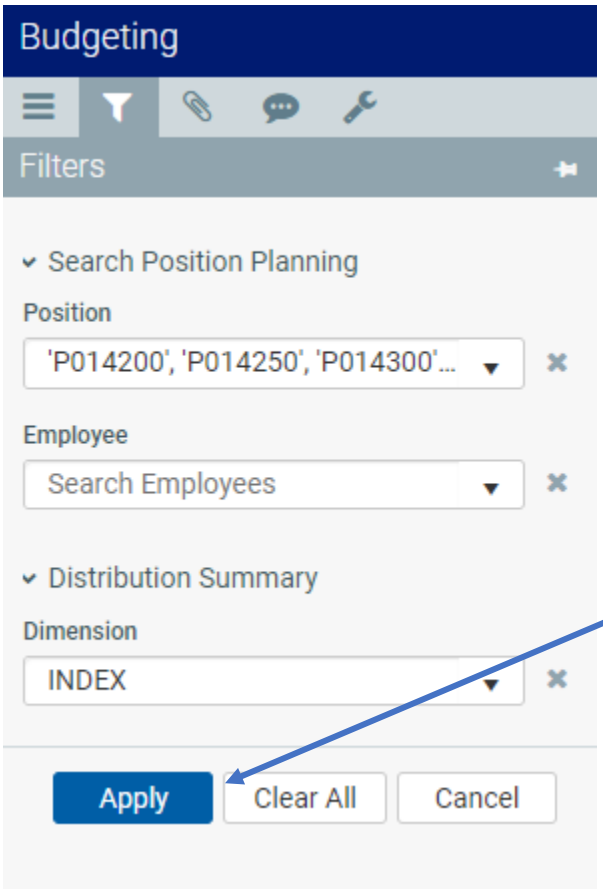


- Type in part of the position title and you will be shown all positions that contain a specific word or abbreviation.
- For example: Type in “Anthro”, you will get a list of all positions with that word in the title.



Click on Select All.

Then Click, OK.

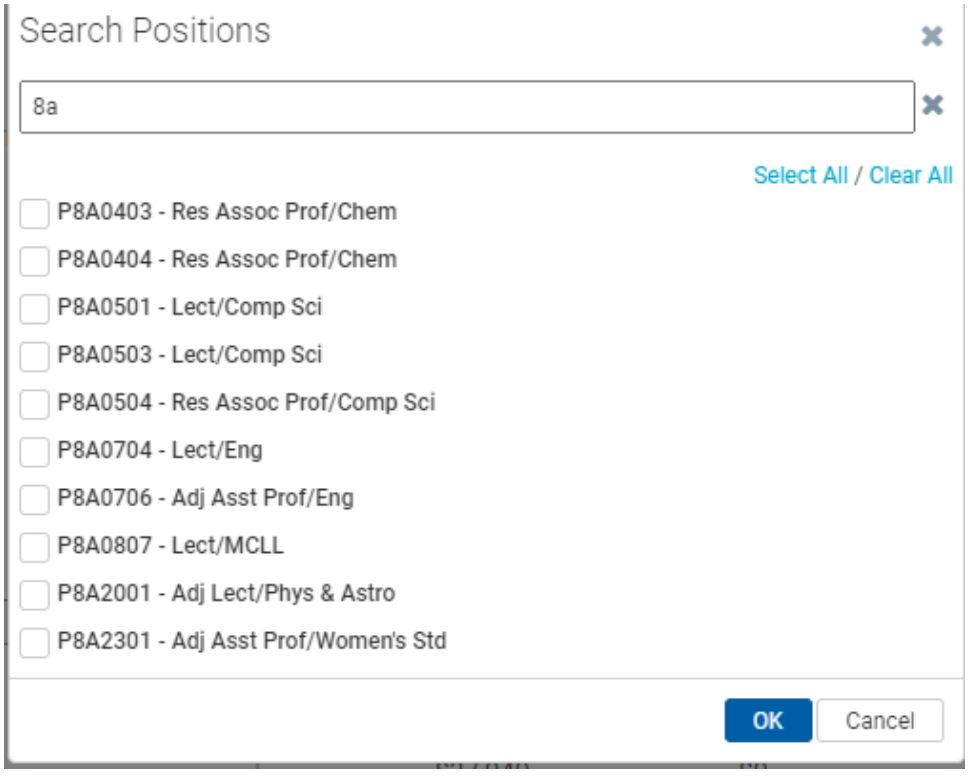


All Positions with "Anthro" in the position title will show up in the Positions search box.

Click Apply.

Position ID	Description	Employee
Faculty : Faculty		
P014200	Prof/Anthro	Gregory Campbell
P014250	Prof/Anthro	G. Weix
P014300	Prof/Anthro	John Douglas
P014350	Prof/Anthro	Kelly Dixon
P014400	Prof/Anthro/Nat Am Std	S. Neyooxet Greymorning
P014410	Prof/Anthro	Anna Prentiss
P014500	Prof/Anthro	Douglas MacDonald
P014700	Prof/Anthro	Randall Skelton
P014760	Assoc Prof/Anthro	Meradeth Snow
P014800	Assoc Prof/Anthro	Leora Bar-el
P014810	Lect/Anthro	David Kerr
P021700	Assoc Prof_Chair/Anthro	Tully Thibeau
P022100	Prof/Anthro	Mizuki Miyashita
P032500	Prof/Anthro	Ardeshir Kia
P039300	Prof/Anthro	Irene Appelbaum
Total Faculty : Faculty		

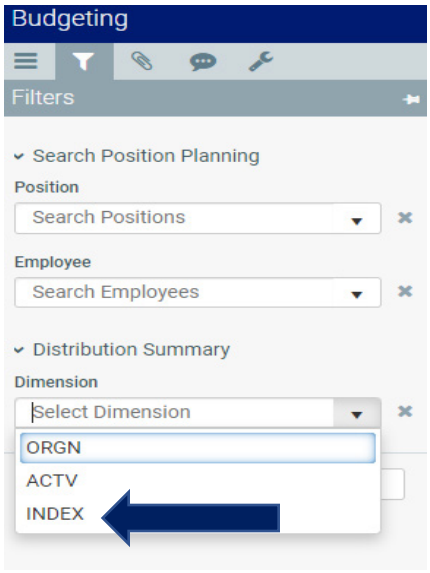
- Click on the Funnel again and click on “Clear All”
- Also, you can type part of the position number as shown below.



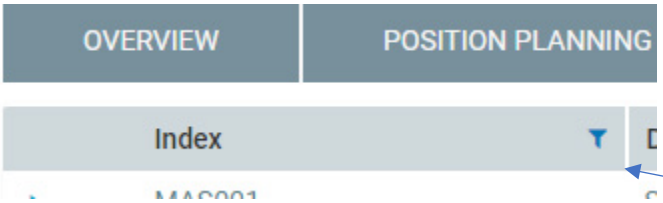
NOTE: Any position titles that are updated by Human Resources will be updated in the Labor Planfile.

Distribution Summary Filter:

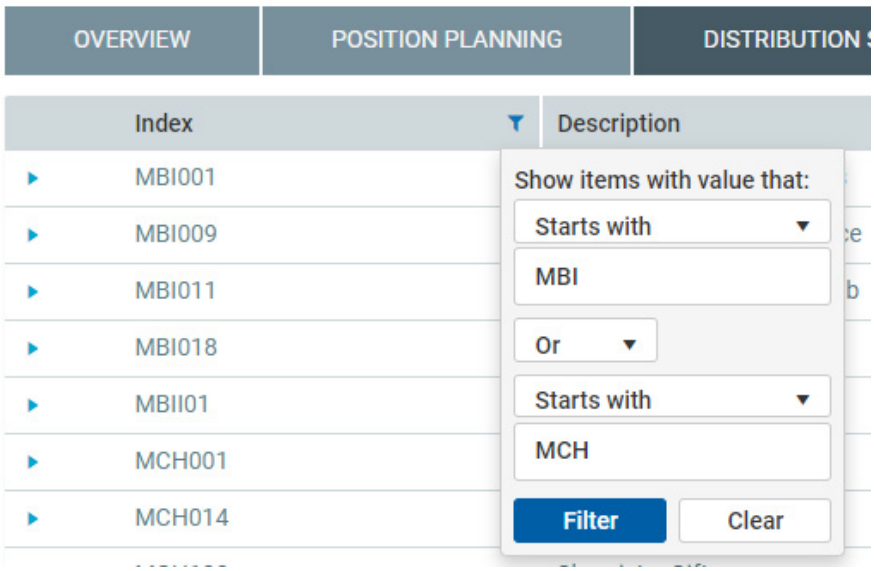
- On the Distribution Summary Tab, you can filter by Org, Activity Code and Index.



- Select "INDEX" and click Apply.
- Next, hover your mouse on the lighter grey text box labeled Index:



A blue funnel will appear.

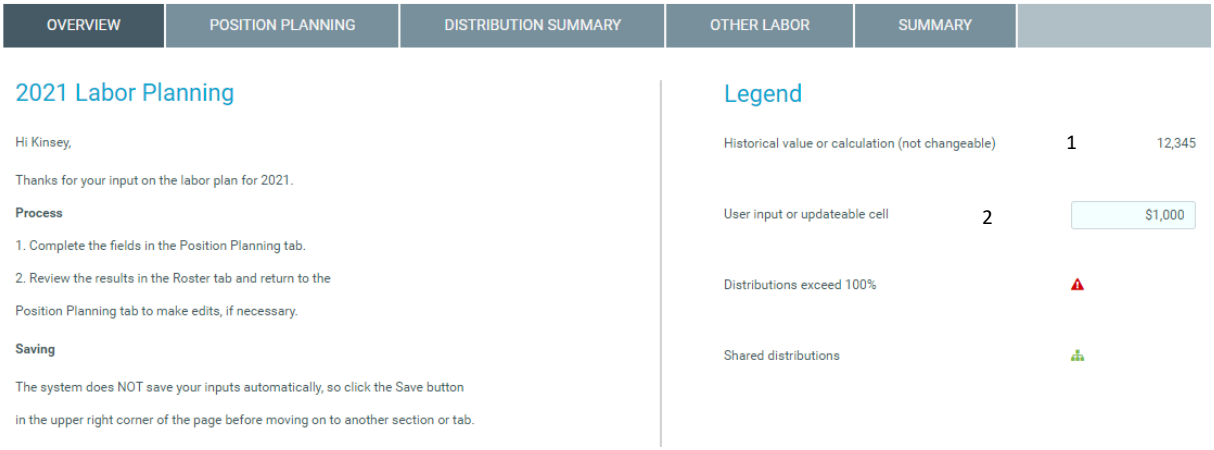


- Click Filter. All indexes that start with MBI or MCH will appear.

Planfile Features:

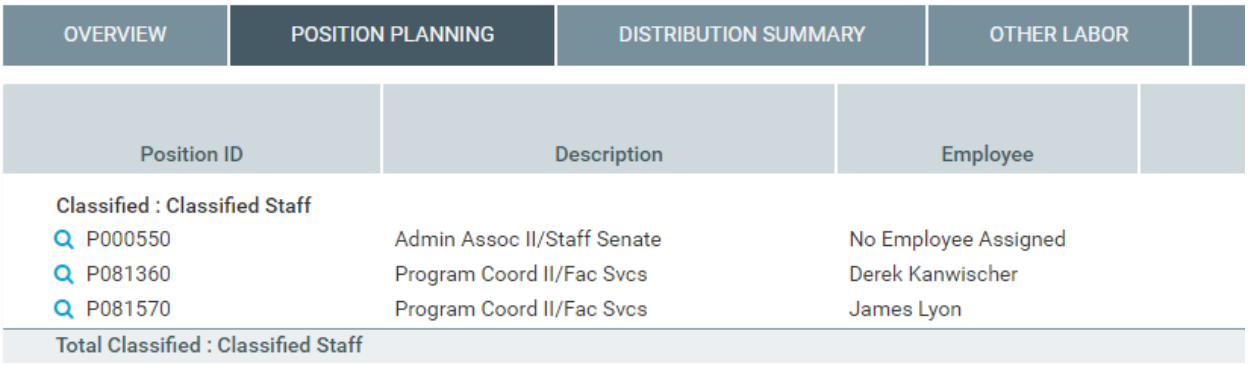
- Labor Planfiles have five tabs – Overview, Position Planning, Distribution Summary, Other Labor and Summary.
- To move between tabs, click on the desired tab and it will bring you to that tab's landing page.

Overview Tab:



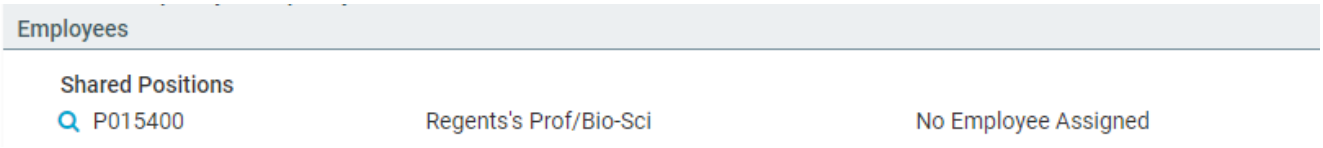
- When you open a Labor Planfile, you will see the overview landing page.
- This will hold information and instructions about the budgeting process from the BPA Office.
- It also holds the "legend" which shows the cells you can make changes to during the budgeting process.
    - (1) Cells with no border and colored white are fed into the budget Planfile and are either historical information or calculated on their own. You cannot make changes to these values.
    - (2) Cells that have a border and are shaded light blue can be updated.
- Icons will show next to positions when salary expense distributions are over 100% and will show next to positions that have shared distributions with another Planfile.

Position Planning Tab:



- The position planning tab is for planning salary and distributions for single positions.
- Positions are categorized by planning category such as Classified Staff or Faculty.
- Positions within a Labor Planfile are assigned to Level 3 Org. based on the budget for that position for the previous fiscal year.
- Positions with "No Employee Assigned" are vacant positions that were budgeted in the previous year. If you do not see a position that you need to budget, use the Budget Request Process (separate process and instructions). The request should include the position number and other relevant information.

  The BPA Office will process the request and fill the position in Axiom so it shows up in your Planfile. If this is a NEW position (one that doesn't exist in Banner), please make sure it is set up in the system by Human Resources before submitting your budget request.



- Shared positions are those who have a home org outside of the specific Labor Planfile, but a portion of the budget rolls up to an index in your Planfile. These shared positions will show at the bottom of the Position Planning tab.
- Columns within the Position Planning tab include – Position ID (position number), Description, Employee and an informational icon.

- Salary and distribution planning columns within the position planning tab include – current salary, pay plan, salary adjustment, proposed salary and budget distribution.

Current Salary	Pay Plan	Salary Adj.	Proposed Salary	Budget Distribution
$29,038	$581	$1,597	$31,216	75.0%

- Salary budgets will be displayed in three columns:
    - Home – The salary amount for that particular record that is budgeted in an index that rolls up to the Level 3 Org.
    - Shared – portion of the salary for that particular record that you are assigning to an index that rolls up to an org outside of the current Planfile you are working in
    - Total – may not match the proposed salary because some of the salary adjustments have start and end dates that are inside of the fiscal year and it may be lower than the annualized version.

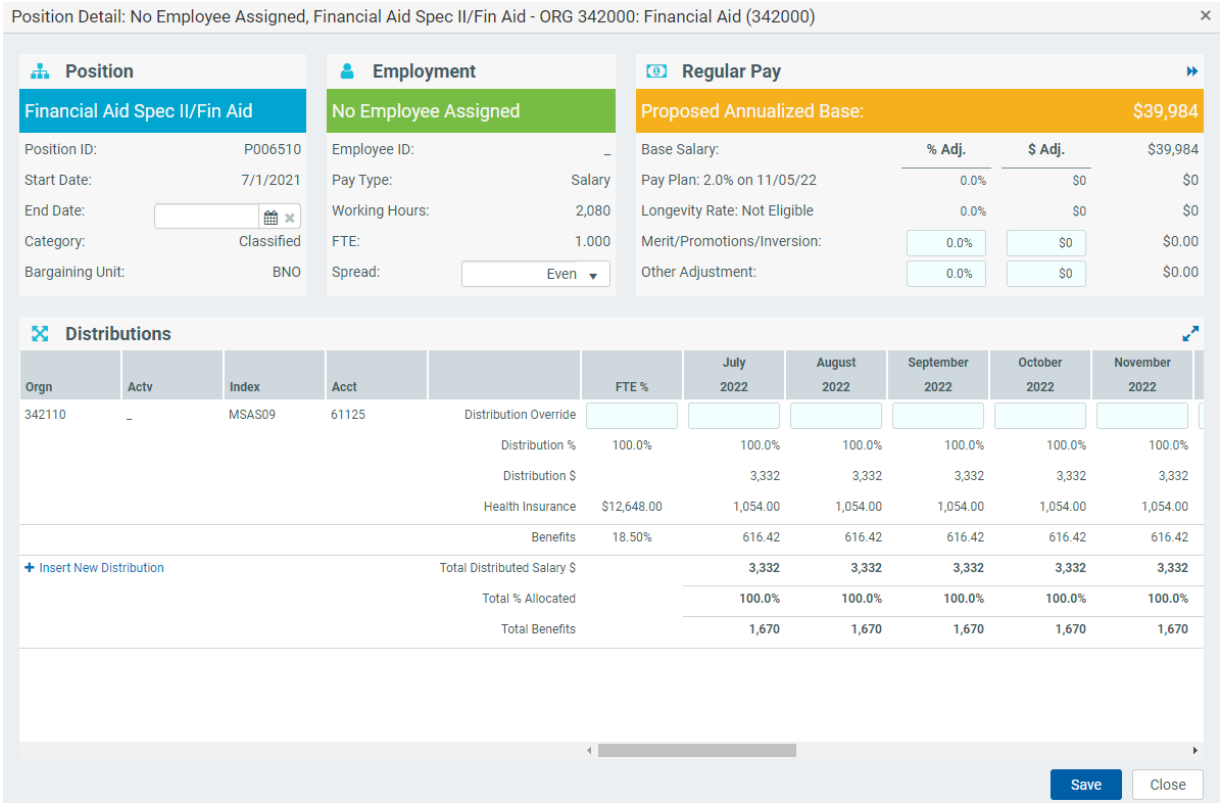
Proposed Salary	Budget Distribution	Salary Budget		
		Home	Shared	Total
$47,778	100.0%	$47,240	$0	$47,240

- The next column is benefits. This is calculated by business logic set by the BPA Office.
- Then you will have total budget, start date, end date, working hours, pay type and hourly rate (if applicable)

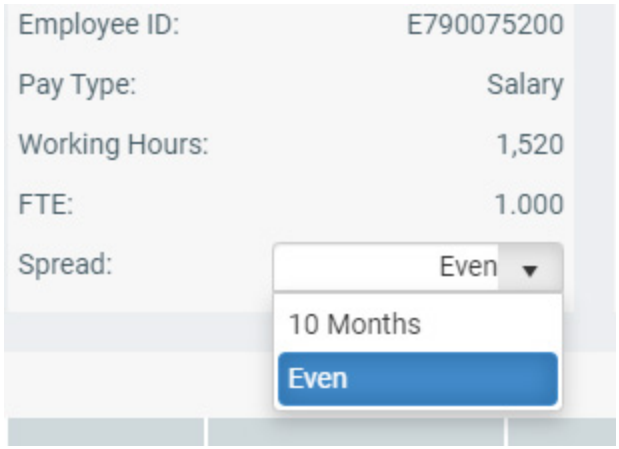
Position Planning – Filters

- See Funnel Section.

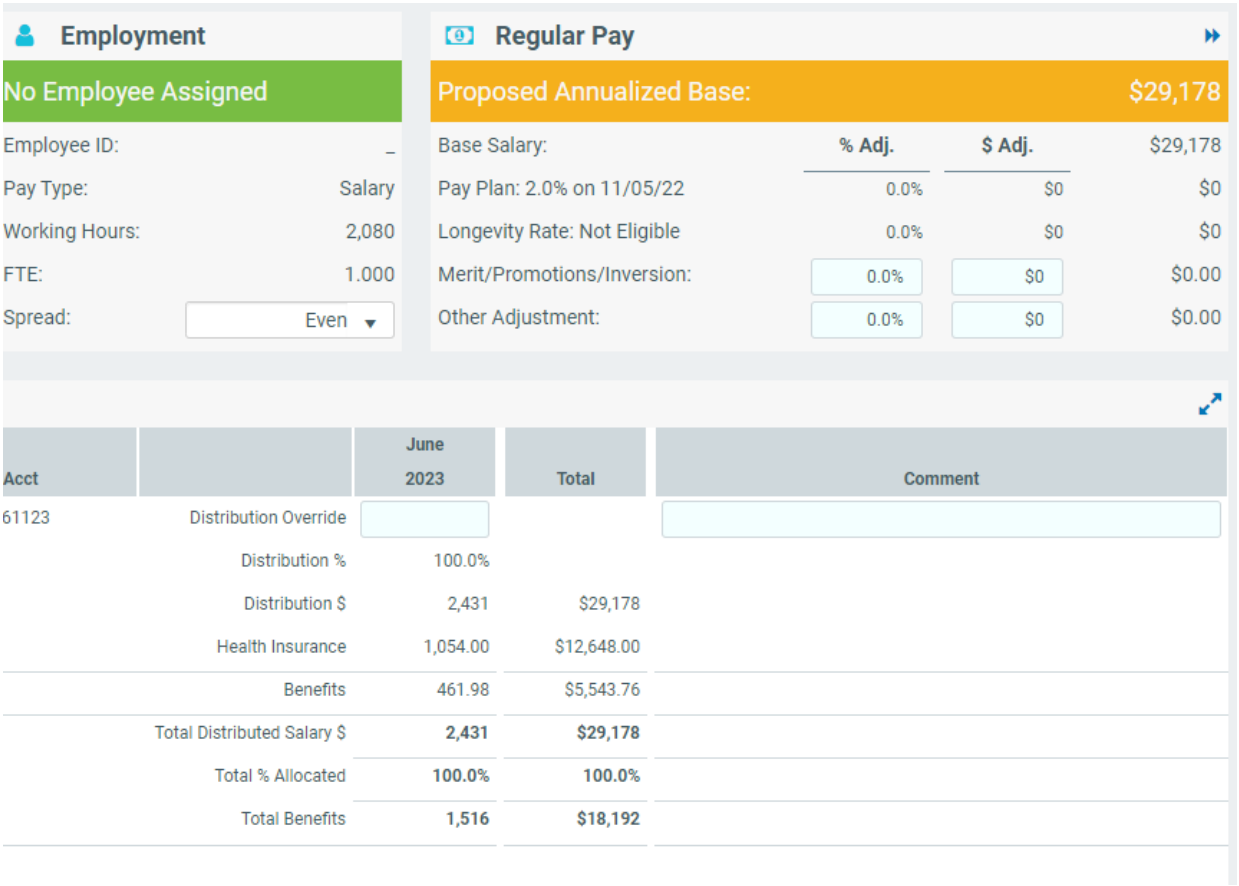
Position Planning/Position Card:



- To make edits to a particular position click on the icon.
- When you click on the magnify glass icon it will open up an employee position card.
- The position card will tell you more details about the Position, Employment and Regular Pay.
- In the position section, the position number will always show with a leading character “P”. You can enter an end date in this section. The end date is a date that falls within the fiscal year that will keep additional budget from being calculated after that date.
- In the Employment Section you will see the Employee ID with a leading character, “E”. The pay type is salary for all our employees. Working hours comes from the employee job record and based on the Factor set up in the job record. A factor of 21 is 1520 hours and 26 is 2080 hours.
- Change the Spread to 10 months or Even by clicking on the drop-down menu next to the Spread.

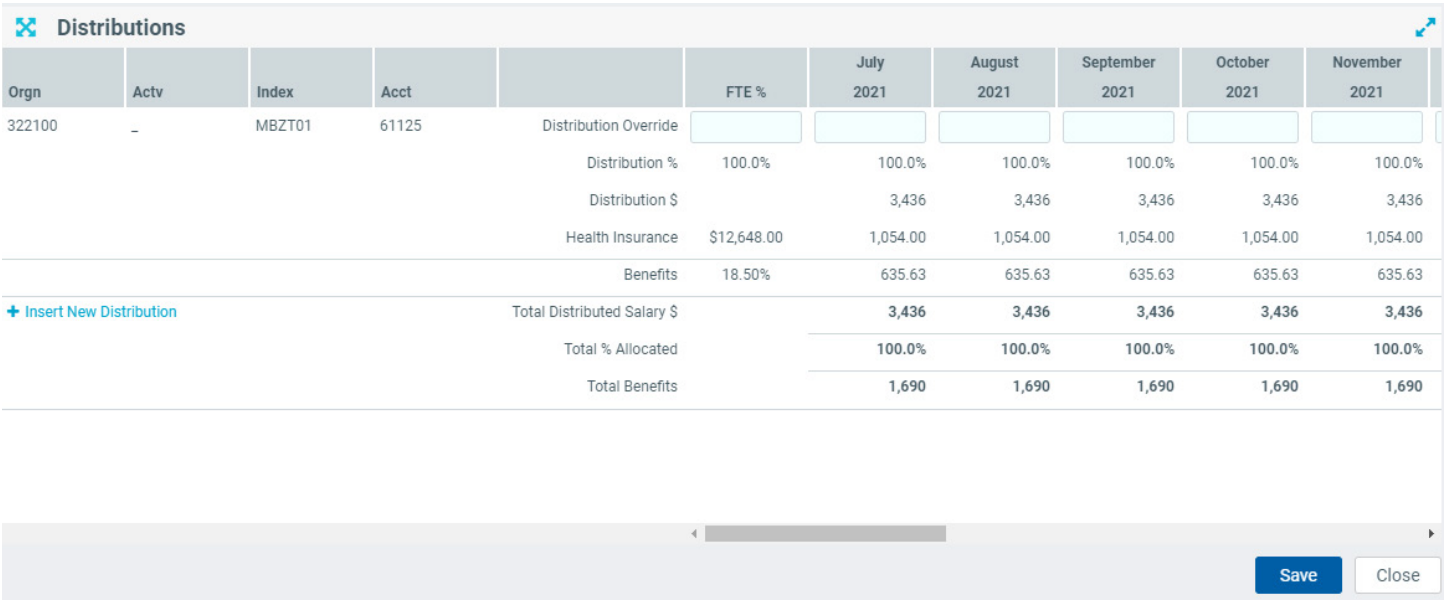


- The Proposed Annualized Base is the base salary from the jobs record in Banner plus the annualized pay plan amount. The Longevity amount is not included in the annualized base as this amount is applied after pay plan or promotions for classified staff.
- Use Merits/Promotions/Inversions to add to the base salary where applicable.
- Other adjustments can be used for adjustments needed in case of calculation errors or unforeseen circumstances that might be needed. Make sure you add comments explaining why you are adding other adjustments. Scroll to the end of the months listed in the "Distributions" section. Sometimes, adjustments are used to adjust pay for vacant positions. (see "No Employee Assigned" section for more information)



The bottom section of the Position Detail Card is for Distributions:

NOTE: Leave the FTE % column alone. Change distribution percentages in the month columns as needed.



Distributions

Orgn	Actv	Index	Acct		FTE %	July 2021	August 2021	September 2021	October 2021	November 2021
322100	_	MBZT01	61125	Distribution Override						
				Distribution %	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
				Distribution $		3,436	3,436	3,436	3,436	3,436
				Health Insurance	$12,648.00	1,054.00	1,054.00	1,054.00	1,054.00	1,054.00
				Benefits	18.50%	635.63	635.63	635.63	635.63	635.63
+ Insert New Distribution				Total Distributed Salary $		**3,436**	**3,436**	**3,436**	**3,436**	**3,436**
				Total % Allocated		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
				Total Benefits		**1,690**	**1,690**	**1,690**	**1,690**	**1,690**

Save Close

- The distribution portion of the position card shows the Distribution Percentage for each month. To keep the same distribution, click save.
- If you wish to change the distributions, enter the % change in the month columns.
- If you enter an update to a specific month, it will carry forward that distribution until you make a change to a future month.
- Use the month columns for changes in distributions throughout the month or if you plan on hiring a position in a later month, put a zero in July and then add a percentage to the month you plan to hire.
- The system will warn you if you have a distribution over 100% with the ⚠ icon. Although it will display a warning message, this will not keep you from saving your work.

Zero a distribution by entering 0 in the July column.

Distributions

Orgn	Actv	Index	Acct		FTE %	July 2022	August 2022	Se
342110	_	MSAS09	61125	Distribution Override		0.0%		
				Distribution %	100.0%	0.0%	0.0%	
				Distribution $		0	0	
				Health Insurance	$12,648.00	0.00	0.00	
				Benefits	18.50%	0.00	0.00	
+ Insert New Distribution				Total Distributed Salary $		**0**	**0**	
				Total % Allocated		**0.0%**	**0.0%**	
				Total Benefits		**0**	**0**	

You can add a new distribution by clicking on + Insert New Distribution

- When inserting a new distribution, you will add Index, Activity Code (not required) and Account.
- When finished, click "Apply"

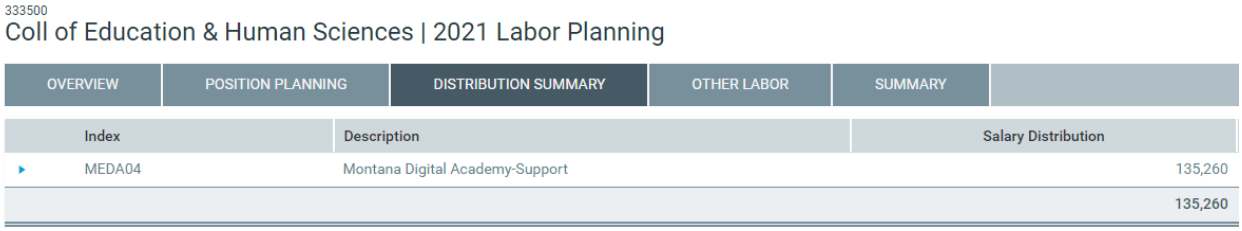
- When you create a new distribution, you will need to alter the distributions for that position so the total equals 100%.
- NOTE***: Please check your distribution indexes for accuracy **before you hit save**. If you enter a new distribution and save the card, the distributions can be set to zero but it will not go away.
- Benefit rates are assigned based on an average calculation for current unrestricted, designated and auxiliary funds for UM and our Affiliates.
- Insurance is charged to all employees in a single position over a .5 FTE. This is a global setting.
- When you have completed making changes in the position card click "Save". You will receive a notice when the record has successfully saved.
- **Important: Open all "No Employee Assigned" cards and save to make sure that health insurance is budgeted. Group insurance is not auto applied to vacant positions.**

No Employee Assigned (vacant positions):

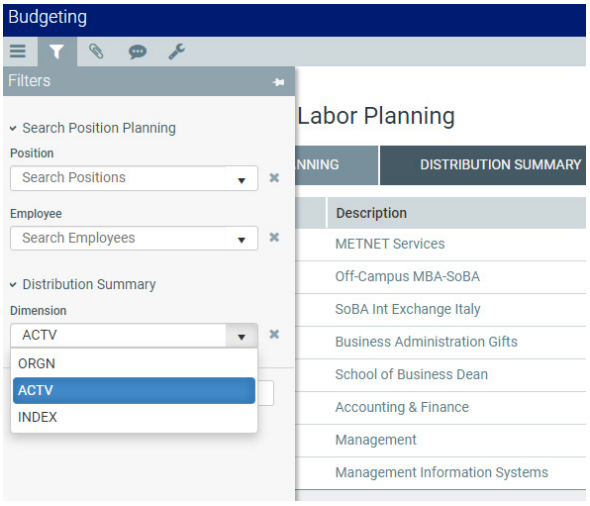
- If you plan to fill a vacant position and the amount of the wage is incorrect use the other adjustment to fix the pay. Make a comment in the "Distributions" section on the position card. Scroll over to the last month and next to the Total Column, you will see a Comment box.
- If a person is vacating a position, use the positions card and add other adjustment pay for termination pay if needed.

If you intend to keep a vacant position in your base budget, make sure you budget for these vacant positions.

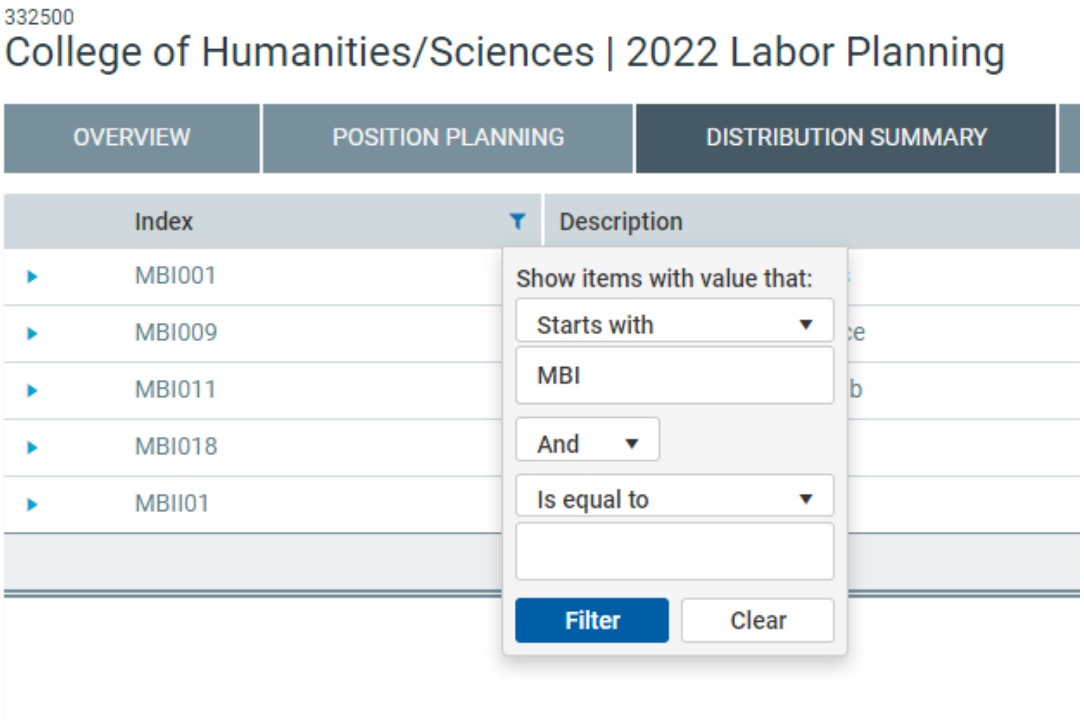
Distribution Summary Tab:



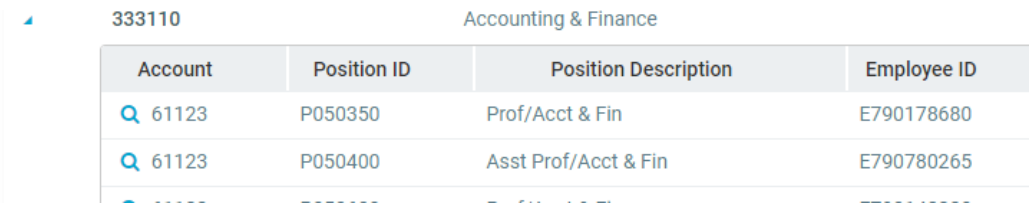
- The distribution summary allows you to see the impacts of your changes on the Position Planning tab in a financial sense.
- By default, it will show you all indexes you have budgeted. This does not show pooled positions.
- You can expand any section to see the individuals that make up that particular distribution to that index.
- Use the funnel to filter this list by ORG, Index or Activity Code. Refer back to the Labor Planfile tools section for tips on using the Funnel for the Distribution Summary.



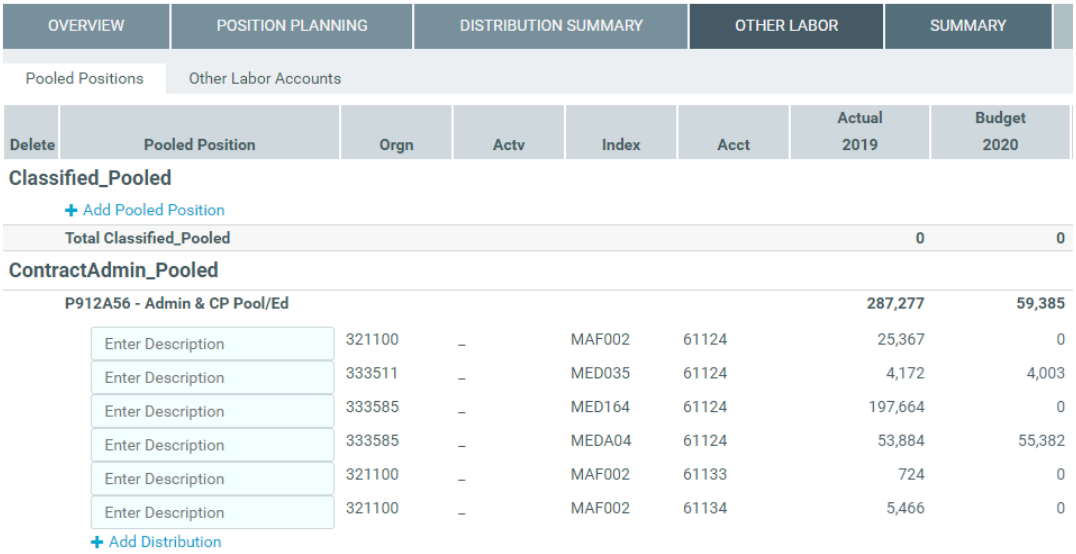
- Switch the Dimension to Index to further filter by the first 3 letters of your Index code:



- You can open up the position card for that particular individual in the distribution summary by clicking the icon

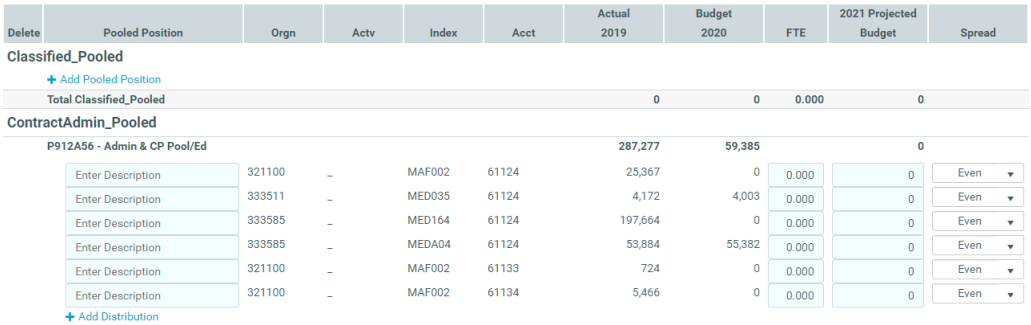


Other Labor Tab:



- The Other Labor tab is for planning Pooled Positions and Other Labor accounts
- You will see two sub-sections under the Other Labor tab – "Pooled Positions" & "Other Labor Accounts"

Pooled Positions:



- The pooled positions sub-section will display every pooled position that has been assigned to the home org of the Planfile.
- Each pooled position will show a separate line for each index that has had actuals in the previous or currently has budget.
- To update the budget just add the desired amount to the projected budget column.
- Add the FTE for pooled positions that require FTE's (i.e. Students, Temporary Pooled, Faculty Pooled, Contract Admin Pooled or Contract Prof. Pooled). Please assign an FTE based on the average salary for your college. If your average graduate student is paid $41,000 per year, a budgeted amount of $287,000 in the graduate student pooled position would be 7 FTE's.

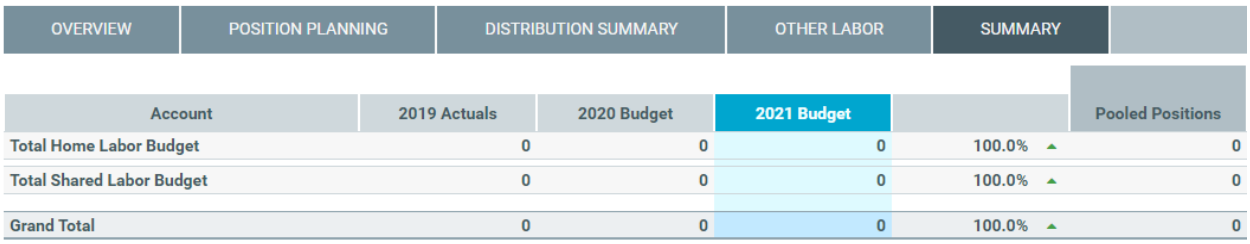
- Please use the average FTE for all employee classes. Extra compensation and ECD's do not have FTE's.
- Non-FTE pooled positions are mostly under Other Pooled positions. This is typically reserved for ECD stipends, Extra Compensation, and Chair Stipends. Pooled positions that are for Overtime or Termination pay may show in other pooled categories but are not budgeted with an FTE. These types of pooled positions are ZERO FTE.
  - ❖ **NOTE: Do NOT enter the same FTE for different position/index combinations.**
  - ❖ The system will add FTE's together for the budget load into Banner.
  - ❖ Enter the FTE that represents the monetary equivalent of the position average for your college. (Faculty FTE for some schools could be $50,000 per FTE.) An adjunct professor paid $10,000 is a **.20** FTE. The average pay for students has probably increased to at least $12 per hour rounded to about $25,000 per year. If you are budgeting $3000 in non-work study students pay or work study pay, that would be 3000/25000 = .12 FTE

❖ Budgeted FTE is not the same as the FTE entered in UApprove to hire adjuncts. Make sure you are calculating the average rate paid to faculty in your college and input the FTE accordingly.

Other Labor Accounts:

- The Other Labor accounts sub-section is for budgeting specific account codes indicated by the BPA Office.
- If those accounts have actuals or budget, they will be fed into the Planfile.
- By default, the current year's budget will be used as the basis for the projected year's budget.
- To make an adjustment to the budget, update the cell shaded light blue with a positive or negative value.
- If you have adjustments for benefits, use 61418 and enter your adjustments and a comment.
- When you are finished with your work click "Save" in the upper right-hand corner.

Summary Tab:



OVERVIEW | POSITION PLANNING | DISTRIBUTION SUMMARY | OTHER LABOR | SUMMARY

Account	2019 Actuals	2020 Budget	2021 Budget		Pooled Positions
Total Home Labor Budget	0	0	0	100.0% ▲	0
Total Shared Labor Budget	0	0	0	100.0% ▲	0
Grand Total	0	0	0	100.0% ▲	0

- The summary tab will show you a compilation of all the salary information you have updated on all other tabs.
- It will also separate salary information by home labor budget and shared labor budget.

There are supplemental reports that can be used to check your labor budget. These reports are still under construction. A separate instruction guide will be developed for the reports.

Please contact the Budget, Planning & Analysis office with questions. You can email us at financehub@umontana.edu. More information can be found on our website www.umt.edu/budget/financehub.