

“What’s New” in Budget Process and BW-BPS Application



PURDUE
UNIVERSITY

Budget and Fiscal Planning



»AGENDA

- Review Available Resources
- BW-BPS Report Additions
- Changes in Budget Submissions
- Budget Table Completion Aids
- Improved Budget Tables for Submission



» Where Do You Go to Get Help?

- 1) Hard copy of the Budget Preparation Instructions
- 2) On-line instructions available via B&FP web
 - This site includes a downloadable set of instructions
- 3) B&FP Contacts
 - Katie Stair 61056
 - Zandra Barker 47135
 - Amy Copas 47141 (Policy only)
 - Cindy McAdams 47133 (Policy only)



» Budget Schedules

» Budget Schedule

> <http://www.purdue.edu/budgetfp/pdf/SBMschedule.pdf>

» Review Schedule

> <http://www.purdue.edu/budgetfp/pdf/ReviewSchedule.pdf>



» BW-BPS Report Additions

» New report folder – “Required System Reports”

- > Appears above Salary Planning
- > Includes all BW-BPS system generated reports that are required for budget submission.
- > New folder is duplicate links to the reports. The original link in the other folders still remains.
- > Users should review list after making last minute changes to budget before submitting reports to capture the latest information.

» Addition of 4 new BW-BPS reports

- > Average Salary Increases – Minority
- > Salary Listing By Total Increase – Zero Percent
- > Other Personnel Costs Table 4
- > Proposed CUL Analysis Table 1B Supplement



» New BW-BPS Reports

» Average Salary Increases- Minority

- > Created new report to eliminate the need to add the Minority Status free characteristic to the Average Salary Increases report.
- > Will continue to be an automated report submitted with budget.

» Salary Listing By Total Increase – Zero Percent

- > Lists all employees that received a total increase of zero percent
- > Created to eliminate the need to add the zero percent variables and rerun the Salary Listing by Total Increase multiple times with different percent parameters.
- > Will continue to be an automated report with explanations for zero percent increases as previously noted in the Budget Analysis Instructions.



» New BW-BPS Reports (cont.)

» Other Personnel Costs Table 4

- > Lists all Vacancies for Faculty, A/P, and Continuing Lecturers.
- > This report should tie to the Excel Table 4 submitted with budget, excluding Operations/Technical positions on the A/P budget group code.
- > This report will need to be included in the budget submission.

» Proposed CUL Analysis Table 1B Supplement

- > Lists all Clinical/Professional , Research, and Non-Tenured Track Faculty CUL change between two fiscal years by funds center.
- > Previously this report was an Excel Table submitted with budget.
- > This will now be an automated report submitted.



» Change in Budget Submissions - Promotions

» Support Documentation 6 - Faculty Promotion Salary Listing

- > **Table will now be used in place of all HR PA forms for each employee receiving a promotion.**
- > Previously called “SALARY LISTING: TARGETED SALARY AND PROMOTION INCREASES”.
- > Accuracy of this document is extremely important.
- > Please note this table now has a signature line for approval of salaries including promotion amounts.



» Change in Budget Submissions - Professorships

» Support Documentation 5 - Salary Supplements for Professorships

- > Excel table now includes signature approvals lines
- > Excel table also additional fields not included in print area of table for use with upload spreadsheet.
 - + Upload spreadsheet includes all fields that are necessary to upload professorships instead of completing ADD Pay forms.
 - + Upload spreadsheets can be sent to Sandy Skiles in PASC when approved.



» Change in Budget Submissions – Table 1

» Anticipated Actual Expense Query

- > Reporting group and Budget and Fiscal Planning have developed a BEX query to capture the Anticipated Actual Expense for use in Table 1 completion.
- > Budget and Fiscal Planning will run the report and publish it on the BFP website
 - + The report will be published with restrictions for access like the HR Retraction Exception list.
- > The report will be formatted exactly like the Excel - Table 1. The data can then be used and modified as necessary for projected full year expenditures.
- > The data will include department level totals, not just college/major unit totals.



» Change in Budget Submissions Income Producing Activities

- » Summary reports detailing revenue and expenditures assumptions will no longer be submitted.
- » Affected areas should have already received a memo regarding details on what should now be reported on their Table 1.
- » Costs should now be fully budgeted in BW-BPS.



» General Reminders and Changes

- » Colleges/Major Units will need to prepare a PA form for their Dean, VP, or Regional Campuses Chancellor salary increases.
 - > Timing does not allow users to data enter these increases.
- » Please remember to zero the Proposed CUL for named employees terminating, and subsequently using their salary increase funds for other employees.
 - > By zeroing the Proposed CUL, it does not make the named employee available for Salary Distribution. Thus eliminates the possibility of the named employee in addition to a vacancy being budgeted.
- » All Support Documentations now have signature and departmental auditing signature lines
 - > This box includes a recommended for approval and approval signature line.
 - > Below the signature box is a Departmental Audited by and Departmental Prepared by lines also be completed.



» General Reminders

» Support Documentation 3 and 4

- > Provost Area would like to see these arranged in the following order
 - + Associate/Assistant Vice Presidents
 - + Associate/Assistant Deans
 - + Department Heads
 - + Directors
 - + Any other positions that report directly to the Provost, Vice President, Vice Provost, and Deans.
 - + Former Vice Presidents, Deans, Vice Provosts, and Department Heads
 - + Associate/Assistant Deans within the last five years.

» Support Documentation 3, 4, and 5

- > DO NOT Include Deans or Vice Presidents
 - Support Documentation 4 should also NOT include administrative assistants or secretaries.



» General Reminders (cont.)

» Please be sure to get updated Budget Analysis Table templates available on the BFP website.

» Running Reports Tip

> Users can data enter their funds center node in the variable selection box for funds center by following the format example below:

pur bp4014

> Example in Portal



Questions??

