

Using the Personnel Data file with Budgeting Worksheets

Files for these procedures are located on the “Employee Information” section of the BRP website:
http://brp/beginning_budget

Using the data with the Classified Planning Worksheet (FY08)

1. Download your personnel information using the PWIORPT report and run the Personnel Planning Macro as explained in the document “Personnel Planning Information.” If you chose not to utilize the personnel planning macro, the data won’t be found in the same places listed here, but the copy/paste procedures are the same.
2. OPEN the Classified Planning Worksheet.

You will get a security warning. Click ENABLE MACROS.
3. Go to the Personnel Data worksheet you created earlier.
4. Go to the Personnel Data File with the tab “classified” and sort the data between the first two gray stripes by step. **Highlight and copy** the data for employees in steps 1-8, (but not the column headers).
5. Go to the Classified Planning Worksheet and place your cursor into cell A6 of the Classified Increases worksheet. Using the **Paste Special—Values** command from the Edit menu, paste the copied data. If you get reference errors in your data is likely because the merit increase cell is blank for that line. Enter the correct date for the corresponding employee, (or enter 7/1/2007 if unknown).

The worksheet will automatically calculate the pay amounts for each month from July 07 through June 08, including estimates of potential increases to the classified steps.

The calculations include adjustments for labor distribution and appointment percent.

You may sort the data any way you wish, and/or use subtotals to total by index, person, etc.

6. Go back to the Personnel Data File. **Highlight and copy** data for employees in step 9, not including the merit increase column. Use the same method as above to paste this data into the Top Step tab of the Classified Planning Worksheet.

This worksheet will calculate pay amounts for those employees at the top of their salary grade.

7. Once the data is copied in, save the Classified Planning Worksheet.

Budgeting for IT Employees

Because IT employees do not have ‘steps’ the Classified Planning Worksheet will not work for them. These records have been placed in a separate tab. IT employees get annual pay increases, but the increase amount is based on performance and where the employee is in relationship to the control point of their classification.

When budgeting for IT employees, you may choose to substitute a set percentage (say 4.5 or 5%) for their increase amount. You will have to calculate these amounts manually, but can use the data in the IT worksheet to help you.

Budgeting for Unclassified employees

You can use the information in the Unclassified tab of the Personnel Data worksheet to assist you in calculating the an increase for unclassified employees. Because there is no published increase projection at this time, departments must use their best judgment when making projection decisions. A 4% January 2008 increase is reasonable.

Using Personnel Data to project OPE for FY08

The data in the classified and unclassified tabs of the file are formatted to match the first four columns of the OPE worksheet; however, the data also contains labor distributions. This won't work for the OPE worksheet, which operates on Appointment Percent and would create duplicated data for each labor distribution.

The data in the OPE-unclassified and OPE-classified sheets are reformatted as one record for each employee. You will need to determine how to split OPE by labor distributions manually.

From the BRP website, make sure you are opening the FY08 Beginning Budget OPE Worksheets with the estimated medical cost increase. Use the two tabs "Uncl List" and "Class List" as the destination for the data.

As you did for the classified budget planning, copy the relevant data, (four columns from the OPE labeled worksheets), from the Personnel Data file and **Paste/Special—Values** into cell A8 of "Uncl List" or "Class List" as appropriate. After you copy the information into the OPE worksheet, you'll need to look over the data and **fill in the next three columns.**

You can either hand-fill the fields or drag the numbers down from the sample entry.

- Mo Opt-out (this figure is only obtainable person-by-person from the OPE summary available in Banner screen, PWIEMPL. It is not necessary to go to this level of detail, but it is available should you wish to.)
- Jul-Nov Mo Work (usually 2.5 for 9 mo and 5 for 12 mo)
- Dec-Jun Mo Work (usually 6.5 for 9 mo and 7 for 12 mo)
- Triple Deduct Y/N (Y for most 9 mo and N for 12 mo)

Every effort has been made to automate as much of the process as possible. Nothing, however, beats the human eye and brain when reviewing numbers for reasonableness. Please look closely at your data to ensure that the projected budgeting figures seem accurate for your area.