SURVIVOR

Baylor College of Medicine

Department of Pediatrics

User's Guide

FY 2018

Survival Guide – FY 2018

Survivor Users Guide/Quick Reference
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Overview

In a departure from prior years, Survivor now requires administrators to proactively select the fundcenter they will be entering budgets for in the current cycle. Consequently, there is a new screen associated with the “Home” menu item, “Fundcenters Status Report” which lists the status of all available fundcenters in the selected section. The summary of expenses which previously loaded from the “Home” menu item is still available and may be viewed by clicking the new “Exp Summary” menu item. Other menu items are very similar to what prior users have been accustomed to with a few new features for FY2018!

New Features

Fundcenters Status Report

The “Fundcenters Status Report” mentioned in the overview enables users to proactively select and activate fundcenters for which a budget will be entered in the upcoming FY. This will also be the screen where fundcenters are marked complete or to indicate where fundcenters may be forcast in the upcoming FY.

Improved Forecasting

Speaking of forecast accounts, this is different this year. Now users are able to very easily indicate existing WBS elements will be forecasted for all or part of the upcoming FY. There’s a bulit-in naming convention and improved reporting to help users distinguish how forecasted funds are being used. This extends to the All Funds part of the budget, not just personnel expenses!

TCH FY

All funds reports may now easily be displayed in the BCM FY format (default) as well as in the TCH FY format which starts Oct 1 and ends Sep 30.

Non-peds personnel expense documented support

Users are able to upload a PDF document directly to the Employee Detail Screen for better collaboration and tracking of authorization of budgeted non-pediatrics sources for personnel support.

New AF Form Entry

Not only has the traditional AF entry form been replaced by an easier/smaller form, but much of AF is now completed automatically/programmatically including the calculation of BCM and Off Campus Indirect Costs as well as offsetting revenues for WBS elements and other 'Net 0' fundcenters.

Survival Guide – FY 2018

Login Instructions

Go to the following URL (bookmark it!):

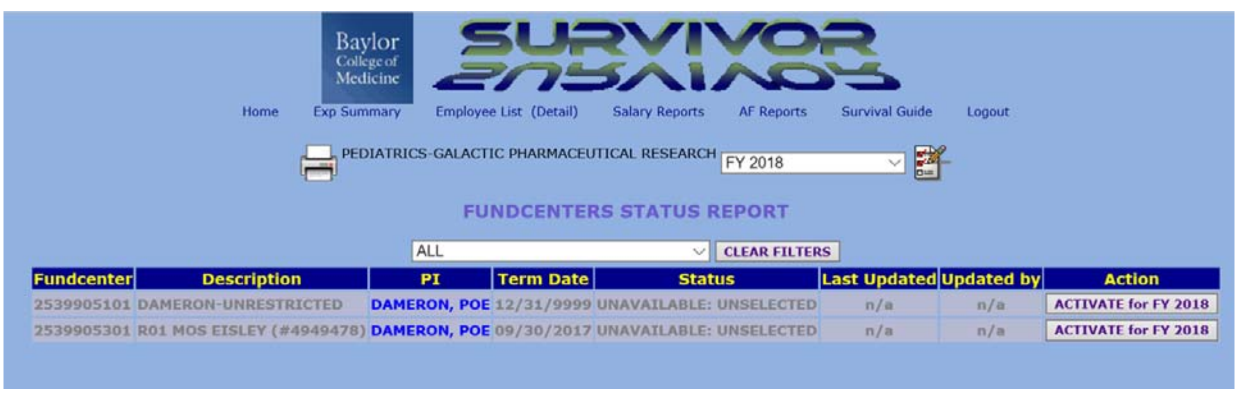
https://intranet.bcm.tmc.edu/private/pediatrics/pbt2008/login_form.cfm

You can also find this link by navigating through the Pediatrics web site:

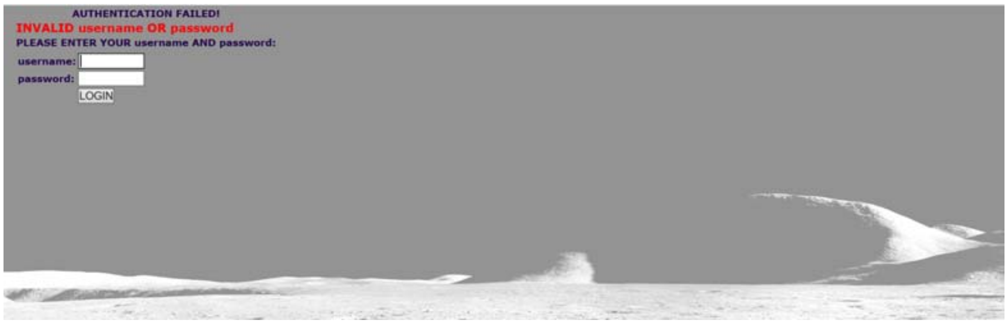
http://www.bcm.edu/pediatrics

- Click on "sections, divisions and centers"
- Then "Administration" (This brings up Pediatrics Administration SharePoint site. Please contact Bill Mohr if you get a security error)
- Then "Budget & Finance"
- Then "Survivor (Pediatrics Budget Tool)" (under Links on lower right of page)
- Enter your BCM ECA – username and password and click LOGIN

If you have security within Survivor, the next screen you see should look like this:



If you do not have security in Survivor, your screen may be stranded somewere like this:



If this is your sorry lot, please contact your section or department administrator to request access.

Fundcenters Status Report

STEP 1: Starting in FY2018, it will be necessary for administrators to explicitly activate all fundcenters to be used for the upcoming budget year. As before, all valid fundcenters are pre-loaded, but they are loaded as “UNAVAILABLE: UNSELECTED”.

To activate a fundcenter in order to enter a budget for it, simply click the “ACTIVATE for FY XXXX” button. This will automatically change the status of the fundcenter to “AVAILABLE INCOMPLETE”. Once you have finished entering all personnel and All Funds amounts you can click the “Mark Completed” button to indicate you have no further entries for that fundcenter.

The Fundcenters Status Report can be filtered by PI simply by clicking on the name of a PI.

Click on the Fundcenter to go directly to the All Funds entry form.

Forecasting a WBS Element

Forecast account management is "New and Improved" this year enabling users to activate forecasts directly from the Fundcenters Status Report which are treated like normal fundcenters, but with enhanced trails connecting them to the WBS elements they are linked to.

In this example, the Skefta Infusion (#94594) WBS element 2539205502 has a 12/31 term date. Note that while we can use this WBS element for 7/1 – 12/31 during the FY, we'll need to forecast if there is to be an extension. Just click the "Forecast for FY XXXX" button to the right:

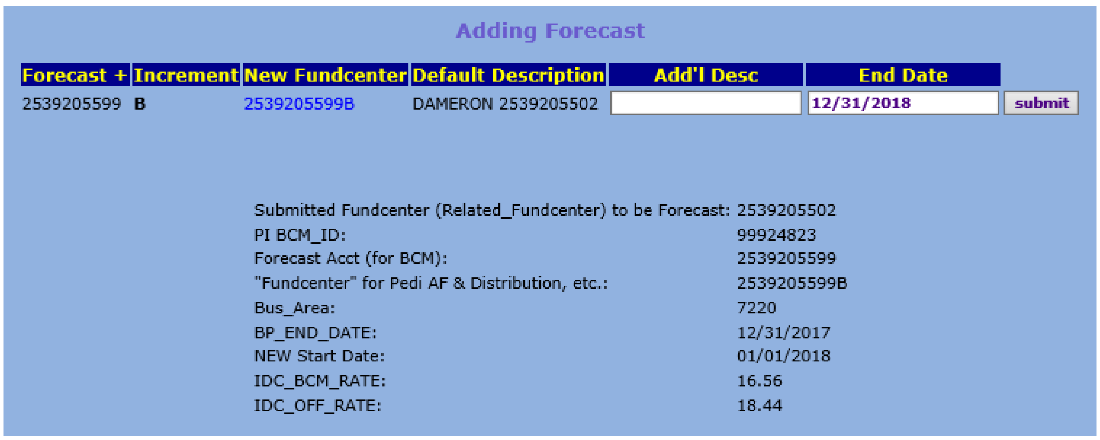
FUNDCENTERS STATUS REPORT

ALL | CLEAR FILTERS

Fundcenter	Description	PI	Term Date	Status	Last Updated	Updated by	Action
2539205101	DAMERON-UNRESTRICTED		06/30/2018	AVAILABLE IN PROCESS	01/04/2017	Bill Mohr	Mark Completed
2539205102	DAMERON-PAZAAK SHARK FUND		06/30/2018	AVAILABLE IN PROCESS	01/04/2017	Bill Mohr	Mark Completed
2539205103	DAMERON-LEADERSHIP FUND		06/30/2018	AVAILABLE IN PROCESS	01/04/2017	Bill Mohr	Mark Completed
2539205303	R01 MOS GAMOS (#5465485)	DAMERON, POE	02/28/2017	AVAILABLE IN PROCESS	01/04/2017	Bill Mohr	Mark Completed
2539205399A	DAMERON 2539205303 Yavin subgroup	DAMERON, POE	02/28/2018	AVAILABLE IN PROCESS	01/04/2017	Bill Mohr	Mark Completed
2539205503	RAKGHOUL SERUM STUDY (#5950)	DAMERON, POE	03/31/2017	AVAILABLE IN PROCESS	01/04/2017	Bill Mohr	Mark Completed
2539205599A	DAMERON 2539205503 Dagobah subgroup	DAMERON, POE	03/31/2018	AVAILABLE IN PROCESS	01/04/2017	Bill Mohr	Mark Completed
2539205602	DAMERON-TCH		06/30/2018	AVAILABLE IN PROCESS	01/04/2017	Bill Mohr	Mark Completed
2539205502	SKEFTA INFUSION (#94594)	DAMERON, POE	12/31/2017	AVAILABLE INCOMPLETE	01/04/2017	Bill Mohr	Mark Completed FORECAST for FY 2018
2539205201	DAMERON-TEMP RESTRICTED	DAMERON, POE	06/30/2018	UNAVAILABLE: UNSELECTED	n/a	n/a	ACTIVATE for FY 2018
2539205202	DAMERON-FUND SUPPORT	DAMERON, POE	06/30/2018	UNAVAILABLE: UNSELECTED	n/a	n/a	ACTIVATE for FY 2018
2539205301	R01 MOS EISLEY (#4949478)	DAMERON, POE	06/30/2018	UNAVAILABLE: UNSELECTED	n/a	n/a	ACTIVATE for FY 2018
2539205302	R01 MOS ESPA (#4654555)	DAMERON, POE	07/31/2017	UNAVAILABLE: UNSELECTED	n/a	n/a	ACTIVATE for FY 2018
2539205304	R01 MOS NYTRAM (#8787414)	DAMERON, POE	02/29/2020	UNAVAILABLE: UNSELECTED	n/a	n/a	ACTIVATE for FY 2018
2539205305	R01 MOS OSNOE (#8798744)	DAMERON, POE	02/29/2020	UNAVAILABLE: UNSELECTED	n/a	n/a	ACTIVATE for FY 2018
2539205501	CLYROSSA-THEMIN (#545)	DAMERON, POE	06/30/2018	UNAVAILABLE: UNSELECTED	n/a	n/a	ACTIVATE for FY 2018

Adding Forecast Screen

The Adding Forecast screen comes up with a default New Fundcenter number derived from the associated PI forecast account and an alpha increment, along with a Default Description consisting of the PI Name and the original WBS Element. The user may enter a brief additional description and modify the End Date (which defaults to the previous end date plus one year).



Adding Forecast

Forecast +	Increment	New Fundcenter	Default Description	Add'l Desc	End Date	
2539205599	B	2539205599B	DAMERON 2539205502		12/31/2018	submit

Submitted Fundcenter (Related_Fundcenter) to be Forecast:	2539205502
PI BCM_ID:	99924823
Forecast Acct (for BCM):	2539205599
"Fundcenter" for Pedi AF & Distribution, etc.:	2539205599B
Bus_Area:	7220
BP_END_DATE:	12/31/2017
NEW Start Date:	01/01/2018
IDC_BCM_RATE:	16.56
IDC_OFF_RATE:	18.44

Additionally, the Adding Forecast screen provides detail information regarding the Business Area, PI, and Indirect cost rates.

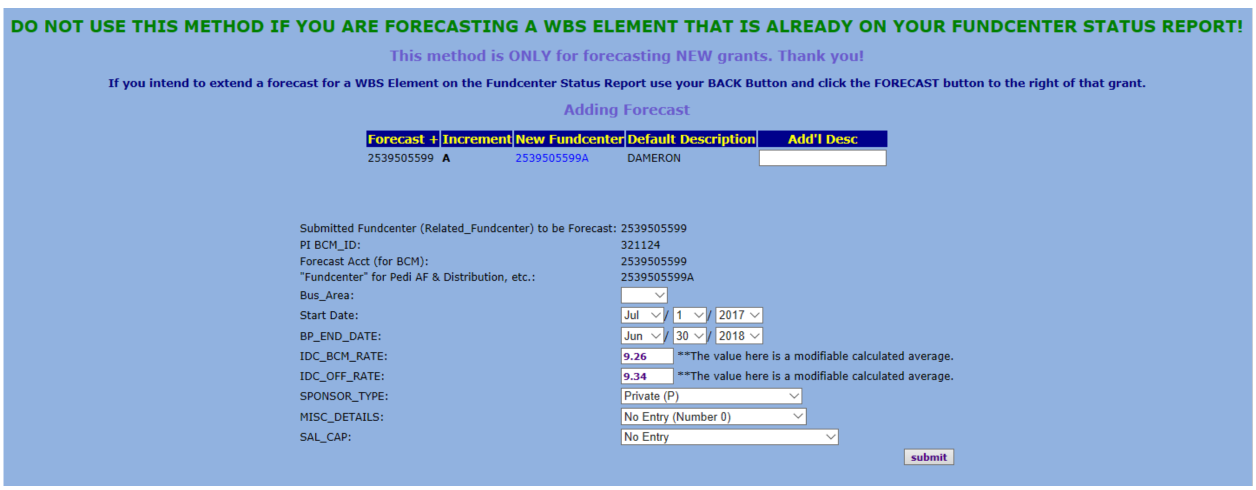
After editing the optional additional description and end date, the forcast account may be used for personnel expense budgeting and will also need to be completed in the new All Funds screen just like other fundcenters.

Adding NEW Forecast Accounts

For brand new grants (not continuations), use the “NEW Forecast” selector at the top of the Fundcenters Status Report.

Choose from the selector the appropriate base forecast account depending on your PI and Fundtype (Federal=399, State=499, Private=599).

Adding NEW Forecast Screen



Just like with the regular Adding Forecast screen, your new forcast comes up with a default New Fundcenter number derived from the associated PI forecast account and an alpha increment, along with a Default Description consisting of the PI Name. The user may enter a brief additional description which now may include the name of the grant and modify other fields including Bus Area, Start and end Dates, IDC rates, Sponsor type, Misc details, and Sal cap.

Note that IDC rates for NEW forecasts are defaulted to a calculated average for the PI/Fund Type or Section, but may be overwritten if the user has better knowledge of the proper IDC rates.

Employee List/Employee List Detail

The banner navigation at the top of the screen includes links to two list views of your employees, the **Employee List** and the **Employee List Detail**.

These are actually two separate reports.

Employee List

The Employee list provides a listing of all of the employees in a specific orgunit along with their Title, BCMID, FTE and Annual Salary. You will notice that the names on the list are links which lead to the Employee Detail Screen where you will execute employee actions for the budget, balance the cost and effort distribution and validate your employees.

SECTION	Name	Title	BCM_ID	FTE	Annual Salary
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ASK AAK	SECRETARY,ADMIN II	99926844	100	$43,804
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	POE DAMERON	CLIN POSTDOC FELLOW	99924823	100	$60,195
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIGGS DARKLIGHTER	PROFESSOR	99921551	51	$97,235
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	99924730	100	$300,000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ADI GALLIA	ASSOCIATE PROFESSOR	99928684	100	$236,808
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ALTON KASTLE	ASSOCIATE PROFESSOR	99922946	100	$111,704
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	AGEN KOLAR	ADMIN ASST,SR, LI	99925279	100	$63,215
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ATAI MOLEC	ASSISTANT PROFESSOR	99928894	100	$182,980
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BARRISS OFFEE	ASSISTANT PROFESSOR	99922865	100	$183,500
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BAIL ORGANA	ASSISTANT PROFESSOR	99920491	100	$170,000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BEN QUADINAROS	INSTRUCTOR	99921035	100	$53,000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BARON VALEN RUDOR	MGR,PROJECT	99927968	100	$61,926
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ANAKIN SKYWALKER	COORD,RESEARCH, SR	99923741	100	$56,788
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	AHSOKA TANO	ASSOCIATE PROFESSOR	99925022	100	$236,808
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ZAM WESELL	CLIN POSTDOC FELLOW	99927376	100	$57,395

Employee List Detail

The Employee List Detail actually runs faster than the Employee List, believe it or not, and provides more extensive information:

Home Exp Summary Employee List (Detail) Salary Reports AF Reports Survival Guide Logout

PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH FY 2018

EMPLOYEE LIST - ALL ALL CLASSES

Section	Name	Title	Fundcenter	Ext. Description	BCMID	FTE	Source Amt	Fringe	% of SAL	% of EFT	Start Date	End Date	Business Area	Internal Order
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ASK AAK	SECRETARY,ADMIN II	2539205101		99926844	100	$6,646	$2,391	90.00%	95.00%	07/01/17	08/31/17	7100	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ASK AAK	SECRETARY,ADMIN II	2539205303		99926844	100	$738	$266	10.00%	5.00%	07/01/17	08/31/17	7120	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ASK AAK	SECRETARY,ADMIN II	2539205101		99926844	100	$33,367	$11,882	90.00%	95.00%	09/01/17	06/30/18	7100	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ASK AAK	SECRETARY,ADMIN II	2539205503		99926844	100	$3,707	$1,322	10.00%	5.00%	09/01/17	06/30/18	7120	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	POE DAMERON	CLIN POSTDOC FELLOW	2539205201		99924823	100	$64,011	$14,607	100.00%	100.00%	07/01/17	06/30/18	8283	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIGGS DARKLIGHTER	PROFESSOR	2539205101		99921551	51	$18,058	$4,426	18.16%	18.16%	07/01/17	06/30/18	8283	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIGGS DARKLIGHTER	PROFESSOR	2539205305		99921551	51	$16,560	$4,063	16.66%	16.66%	07/01/17	06/30/18	7300	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIGGS DARKLIGHTER	PROFESSOR	2539205501		99921551	51	$16,560	$4,063	16.66%	16.66%	07/01/17	06/30/18	7300	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIGGS DARKLIGHTER	PROFESSOR	2539205502		99921551	51	$48,236	$11,830	48.52%	48.52%	07/01/17	06/30/18	7200	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205101		99924730	100	$10,696	$1,536	21.15%	21.15%	07/01/17	08/31/17	7210	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205101		99924730	100	$7,915	$1,137	15.65%	15.65%	07/01/17	08/31/17	8299	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205101		99924730	100	$1,012	$145	2.00%	2.00%	07/01/17	08/31/17	8399	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205101		99924730	100	$20,230	$2,906	40.00%	40.00%	07/01/17	08/31/17	8283	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205102		99924730	100	$607	$88	1.20%	1.20%	07/01/17	08/31/17	7115	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205202		99924730	100	$5,058	$727	10.00%	10.00%	07/01/17	08/31/17	8200	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205303		99924730	100	$5,058	$727	10.00%	10.00%	07/01/17	08/31/17	7120	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205101		99924730	100	$40,086	$5,639	15.65%	15.65%	09/01/17	06/30/18	8299	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205101		99924730	100	$5,119	$721	2.00%	2.00%	09/01/17	06/30/18	8399	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205101		99924730	100	$54,176	$7,620	21.15%	21.15%	09/01/17	06/30/18	7210	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205101		99924730	100	$102,458	$14,410	40.00%	40.00%	09/01/17	06/30/18	8283	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205102		99924730	100	$3,075	$434	1.20%	1.20%	09/01/17	06/30/18	7115	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205202		99924730	100	$25,617	$3,600	10.00%	10.00%	09/01/17	06/30/18	8200	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	BIB FORTUNA	PROFESSOR	2539205503		99924730	100	$25,617	$3,600	10.00%	10.00%	09/01/17	06/30/18	7120	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ADI GALLIA	ASSOCIATE PROFESSOR	2539205101		99928684	100	$1,653	$275	4.14%	4.14%	07/01/17	08/31/17	8299	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ADI GALLIA	ASSOCIATE PROFESSOR	2539205101		99928684	100	$15,968	$2,658	40.00%	40.00%	07/01/17	08/31/17	8283	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ADI GALLIA	ASSOCIATE PROFESSOR	2539205101		99928684	100	$3,805	$633	9.53%	9.53%	07/01/17	08/31/17	7100	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ADI GALLIA	ASSOCIATE PROFESSOR	2539205101		99928684	100	$1,597	$266	4.00%	4.00%	07/01/17	08/31/17	7210	100000
PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH	ADI GALLIA	ASSOCIATE PROFESSOR	2539205101		99928684	100	$907	$151	2.27%	2.27%	07/01/17	08/31/17	7120	100000

The Employe List Detail will show the full cost distribution with salary and fringe charged to whatever fundcenters the employees are charged to. Additionally, you have the Start and End dates and the business areas. Clicking the double-ended yellow arrow icon in the Fundcenter column toggles the Ext. Descriptions on/off. The Ext. Description field will show you the TCH Acct number or Forecast account descriptions, if available.

Both the Employee List and Employee List detail reports can be downloaded to Excel and, on the screen, will provide totals at the bottom.

Additionally, note that clicking on an emplyoee name will take you to the Emplyoee Detail Screen for that employee, while clicking on a Fundcenter will take you to a report of all employees charged to that particular fundcenter.

Both reports (as well as many other reports in Survivor) provide some user flexibility and action via Selectors and Icons – see below.

Selectors

There are a number of Drop-down selection lists and icons at the top of the screen. Here is an explanation of each:

ORGUNIT Selector: If your Survivor Security provides access to more than one orgunit, the first drop-down selector is used to indicate which orgunit you are working with. Users can only view Annual Salary information for employees in the orgunits they have access to.

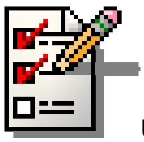
RECORD TYPE Selector: The drop-down selector to the right of the orgunit indicator defaults to show you the active record types you are working on for the budget year approaching (e.g. FY 2018). There are two other selections you might make, "RAW 6/30 (Initial Data)" which will show you the data as it was originally loaded into Survivor from SAP and other sources – basically your starting point, and the third selection is "7/1 Records Only" which will shorten your view to only those employees and records with 7/1 as the starting point.

Validation Status: As you work on the Salaries of your employees, you will need to "validate" each and every employee record. This just means that you need to actually look at each record checking that the information provided is correct and making whatever changes might be required or advisable and clicking a VALIDATE button to confirm the record has been reviewed. This selector enables you to view only those records which have or have not been validated or all the records. You will notice that initially none of your records are validated and they will appear with a grey background on the Employee list and other reports until they have been validated.

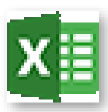
Class Status: You might want to focus on your faculty first, then your staff and fellows. This selector enables you to limit the list to a specific class or ALL CLASSES (default).

Icons

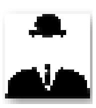
Icons are actually links to other Survivor features. If you forget what they do, try hovering over them and it might give you a clue!

 **User Application Preferences**

Survivor has some customizable features which the user can control. Most notably, you might want to look back on previous year budgets to see how things were done with particular accounts etc. Via this link you can do that as well as make modifications to your preferences for the initial default fundcenter for new employees that are added to the tool, sounds, etc.

 **Download to Excel**

Many reports in Survivor contain Excel-friendly information, so please feel free to use this icon to download your reports and slice and dice, sort and filter to your hearts content!

 **Add a Person**

This is my favorite icon – ADD A PERSON – you see it's like a hat, tie, and a jacket, but no person – you have to ADD the person… get it? You will use this icon to add people into your budget whether they are already full BCM employees, "To be Named" (TBN) employees, or entries for supplemental pay (such as moonlighting). You will NOT add any employees for Pediatrics employees in other sections or departments. Pediatrics employees must be added by the section admins for their particular section. Other department employees are budgeted in the BCM BPC budget tool and are automatically imported to Survivor. You can view the data coming from BPC by reviewing the "NON Peds Funds Usage" report in the "Salary Reports" menu.

Employee Detail Screen

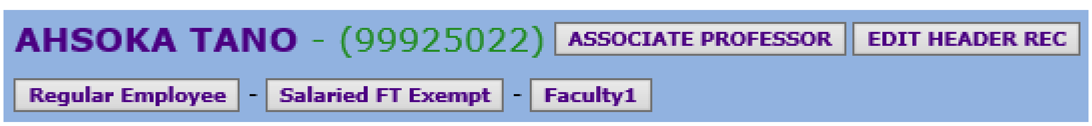
The Employee Detail Screen is the central point for administrators to make budgetary changes to personnel including actions such as salary changes, promotions, FTE changes, or removing employees from the budget. Additionally, this is the central point for editing the cost and effort distributions for all paid employees in the budget.

Layout

The Employee Detail Screen has several areas of importance including:

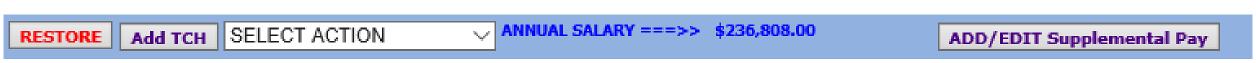
1) Employee Header Information
2) Action Buttons
3) Distributions
4) Summary
5) Error messages
6) Action / Validation buttons

Employee Header Information



Below the standard Page header navigation which appears on every page in the Survivor application, you will see the Employee Header Information consisting of the Employee Name with BCMID in parenthesis (hovering over the name will show you the employee position number). You will also see “buttons” showing the employee Title, Group, SubGroup, and Personnel SubArea. Clicking any of these buttons will bring the user to a report of all of the employees in the orgunit with the selected attribute (e.g. all “Faculty1” employees).

Action Buttons



Just below the Employee Header information is a row of buttons including RESTORE, Add TCH, SELECT ACTION, the Annual Salary for the employee as well as ADD/EDIT Supplemental Pay. The workings of these buttons are described in another section.

Distributions

Fundcenter	Description	Sub-Description	Business Area	% of SAL	% of Effort	Source Amt	Fringe	Start Date	End Date	DEL	Auth
2539205602	DAMERON-TCH		7100	2	2	$4,739.00	$792.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205102	DAMERON-PAZAAK SHARK FUND		7115	1	1	$2,364.00	$394.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205101	DAMERON-UNRESTRICTED		7200	4	4	$9,474.00	$1,572.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205599A	DAMERON 2539205503 DAGOBAH SUBGROUP		7200	5	5	$11,838.00	$1,970.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205101	DAMERON-UNRESTRICTED		8284	86	86	$203,655.00	$33,899.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205101	DAMERON-UNRESTRICTED		8399	2	2	$4,738.00	$790.00	Jul / 1 / 2017	Jun / 30 / 2018		
								submit			

Employees may have just one or very many rows of cost and effort distribution. Each row indicates a Fundcenter, Description, Ext. Description (if toggled), Business Area, % of SAL, % of Effort, Source Amt, Fringe, and Start and end dates. More about entering and editing distributions later.

Summary

Total Salary = $236,808
Sum of Sources = $236,808 ===> Cost must equal 100% for each period
Total Fringe = $39,417

Total Employee Effort = 89 % ***Effort must equal 100%. One or more periods do not sum 100% effort, please correct.***

The Summary at the bottom indicates what the Total salary SHOULD be, how much it currently adds-up to and shows a difference. Please note that if the "Sum of Sources" is red, but matches "Total Salary", it indicates that the cost percentages are off and automatic features are causing the dollars to match, though the record cannot be validated until cost percentages are entered so that they sum 100% for each period. If the distribution is not balanced, you will not be able to VALIDATE your employee which is mandatory before your budget can be submitted.

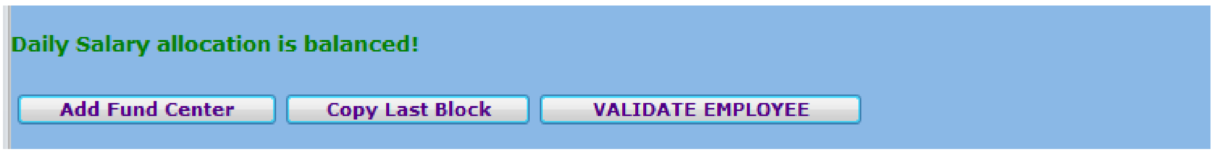
Error Messages

Error: You must specify a TCH Account number.

Error: End Date past Term Date (03/31/2018) for (2539205599A).

Depending on how things are going on the Employee Detail Screen there may be several, one, or no error messages at the bottom of the screen. These messages are intended to provide guidance in helping the Survivor user edit the records within defined parameters. Once the proper edits are made, the error messages will no longer appear.

Action/Validation Buttons



The Add Fund Center, Copy Last Block and VALIDATE EMPLOYEE buttons appear at the bottom of the screen. **Remember, you will ONLY see the VALIDATE EMPLOYEE button if the employee has cost/effort properly distributed and there are no other validity errors**.

Employee Actions

All Employee Actions for your section should be completed BEFORE you begin editing the cost and effort distribution. Trust me. It's just easier that way!

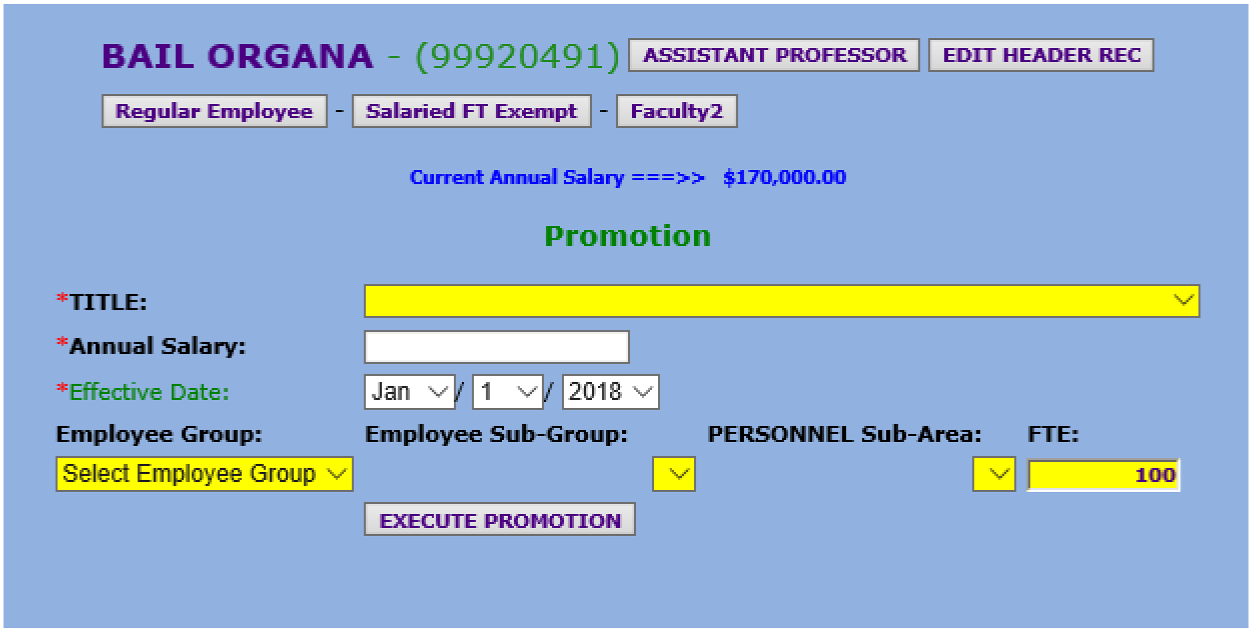
While Survivor allows the user to budget for various employee actions, it is important to remember that the actions in Survivor are NOT the same as actions in SAP. This section overview will explain the available Employee Actions in Survivor and what the ramifications of these actions are in terms of interfacing with SAP.

- *PROMOTION*
- *SAL CHANGE*
- *REMOVE FROM BUDGET*
- *OTHER CHANGE*

PROMOTION

Please note that promotions between classes (e.g. from "FELLOW" to "FACULTY") entered into Survivor are intended to be effective as of 7/1 of the budget fiscal year. If there is to be such a personnel promotion effective on another date, such as 1/1, you will NOT use the PROMOTION action, but rather you will budget for the employee through the last day of their current position and you will ADD a new employee (TBN) using the same name, but with the new position information. **Promotions within the class may happen on any date during the FY.**

To execute a promotion for an employee effective 1/1, select PROMOTION from the SELECT ACTION selector. You will come to the PROMOTION Screen:

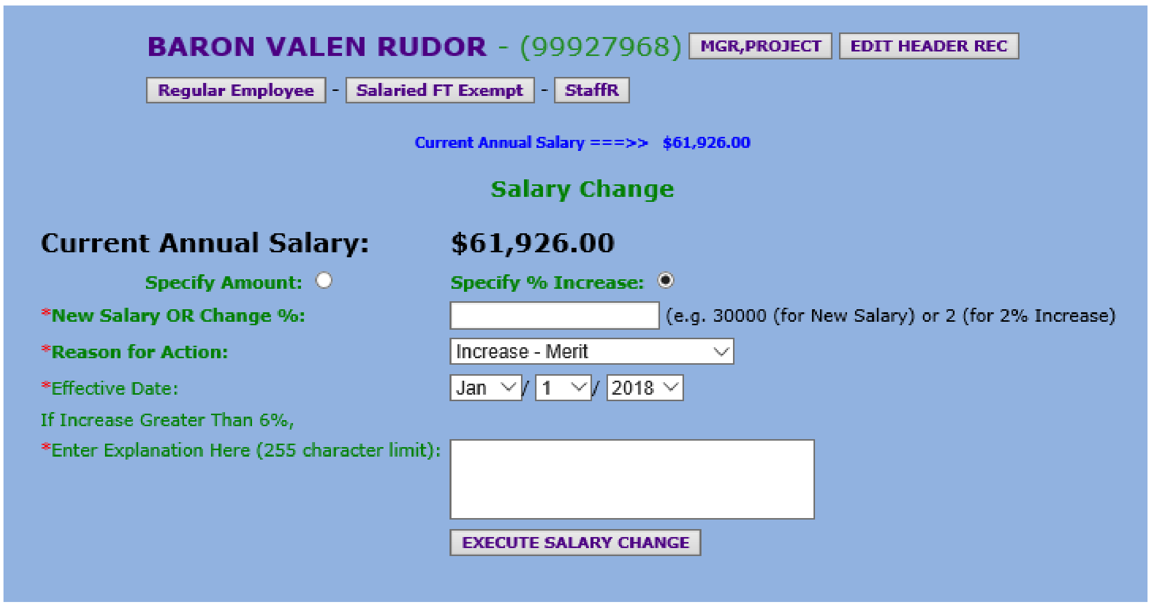


Select the appropriate TITLE, enter the Annual Salary, then select the Employee Group, Sub-Group, and SubArea. Make sure the FTE is correct , then click “EXECUTE PROMOTION”. The employee will be updated with the information you entered and you are brought back to the Employee Detail screen for further actions.

Promotions entered in Survivor do not cause ANY action in SAP – you will still have to enter the promotion transaction in SAP manually.

SAL CHANGE

All Increases AND Decreases are entered using this Action. Select SAL CHANGE and you are brought to the Salary Change screen:

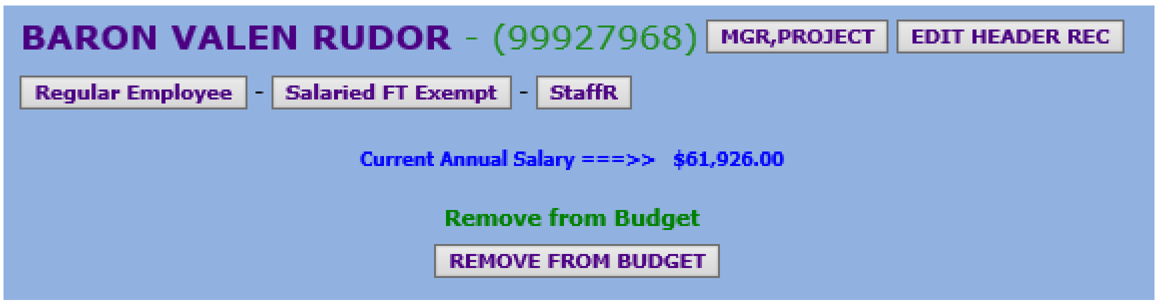


The default is to enter an increase by percent (e.g. 2 for 2 percent), but you might also enter an amount directly if you change the default radio button selection to "Specify Amount". You must also select a "Reason for Action" and the normal RFA's from SAP are available here. If you are entering an increase above the amount permitted under the current budget guidelines, you will be asked to enter an explanation. The comments you enter in the Explanation box will generate an e-mail directly to the department administrator. Once you click "EXECUTE MERIT INCREASE", you will be directed to the Employee Detail Screen for further actions.

For FY 2018, a 3% merit increase has been pre-entererd for all STAFF. This is for budgeting purposes only as we will handle actual staff merit increases by an external spreadsheet along with staff performance appraisals as we have for past couple years. This 3% staff salary increase should remain unless you are entering a promotion/equity or some other valid business reason to exclude them from the overall calculation. Please contact pediatrics-administration if you are unsure.

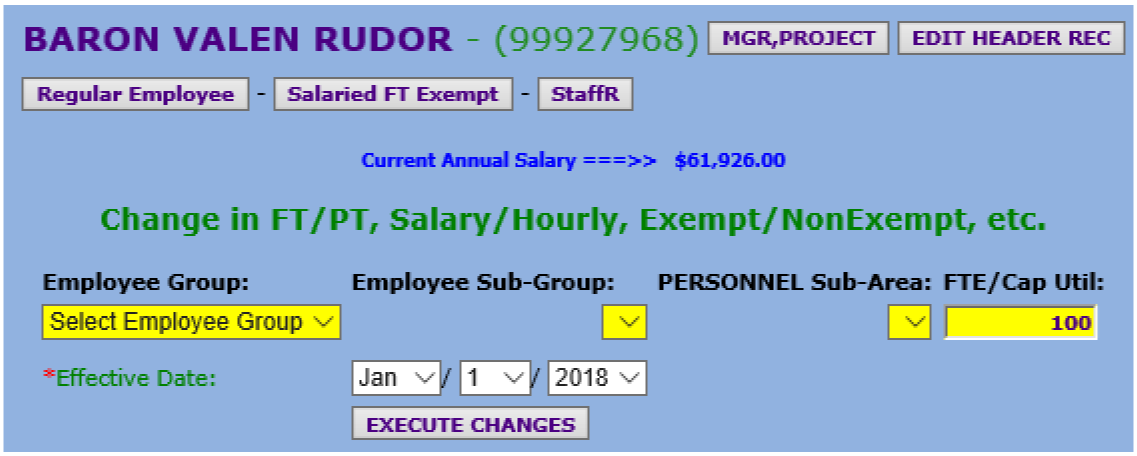
REMOVE FROM BUDGET

When you know that an employee will not be paid during the upcoming FY, you should remove them from the budget tool using this action. Select REMOVE FROM BUDGET from the selector and you will be asked to confirm the removal:



When you click on the "REMOVE FROM BUDGET" button, the employee's status is changed to 0 (3 means 'ACTIVE') in the HEADER table and they will no longer appear on your Employee List or any other reports except for the "Removed from Budget" report – where there is a feature to RESTORE them, if need be. The Removed From Budget report is accessible via the Salary Reports link at the top of the screen.

OTHER CHANGE



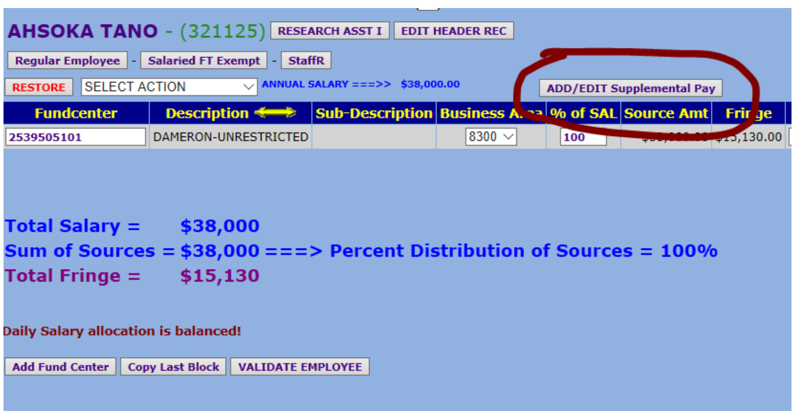
The 'other' changes you might make to an employee besides promotion, salary changes, or removing them from the budget, include changes to Employee Group, Employee Sub-Group, Personnel Sub-Area and FTE.

Below the selectors on this screen, you will see the CURRENT values for the employee you are changing.

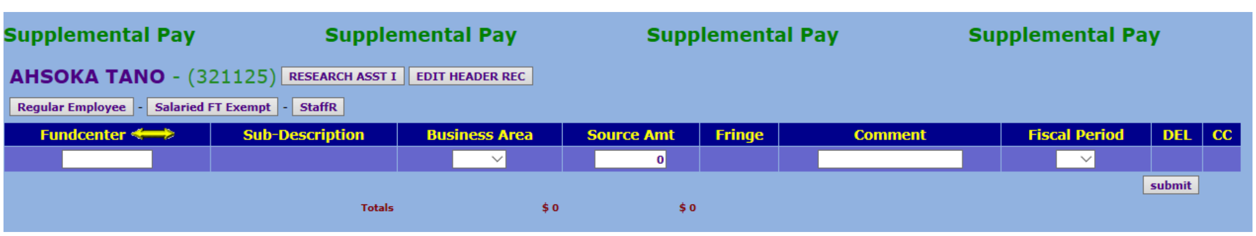
Changes to FTE in this screen will cause Annual Salary to be recalculated. For example, if you are changing a full time employee at $60,000 Annual Salary to a part time employee at 50 % FTE, the Annual Salary will be automatically calculated to be $30,000. For this reason, we advise that you enter any salary changes first before changing FTE if both salary and FTE are to change.

ADD/EDIT Supplemental Pay (for a specific employee)

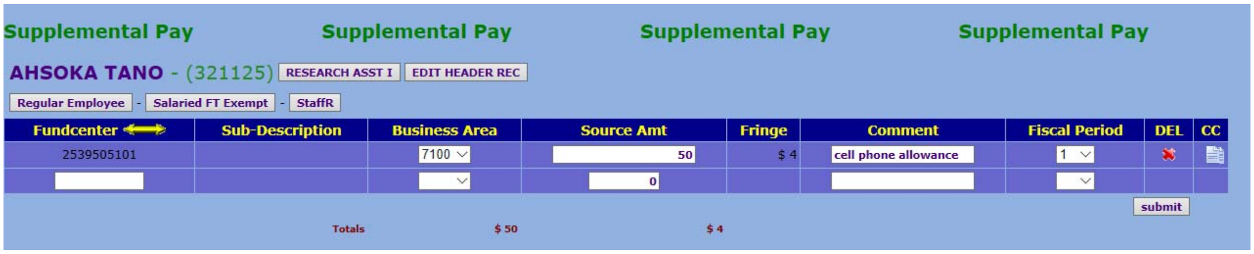
You may want to budget specific supplemental pay for an employee which may be recurring monthly, as in a cell phone allowance, or maybe just during one fiscal period or multiple fiscal periods. To do this, click on the ADD/EDIT Supplemental Pay button just above the cost/effort distribution on the Employee Detail Screen.



When you have no supplemental pay entered yet, the entry screen looks like this:



Enter Fundcenter, Bus Area, amount and descriptive comment, then select Fiscal period and click submit. This adds the supplemental pay and provides a new line in case you have additional lines to add.



Supplemental Pay Supplemental Pay Supplemental Pay Supplemental Pay

AHSOKA TANO - (321125) RESEARCH ASST I EDIT HEADER REC

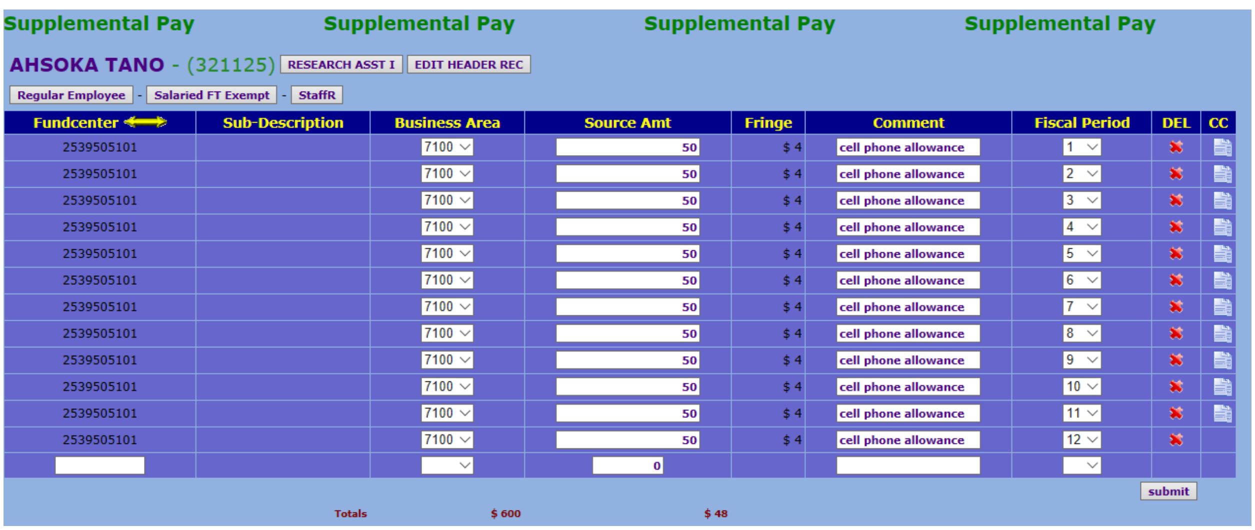
Regular Employee - Salaried FT Exempt - StaffR

Fundcenter	Sub-Description	Business Area	Source Amt	Fringe	Comment	Fiscal Period	DEL	CC
2539505101		7100	50	$ 4	cell phone allowance	1		
			0					

submit

Totals $ 50 $ 4

You can click the in the DEL column to remove a line and you can click the to copy the line for the next period. This feature is most helpful when you are entering monthly recurring supplemental pay as all you need to do is click, click, click the next CC icon until you have all twelve periods populated.



Supplemental Pay Supplemental Pay Supplemental Pay Supplemental Pay

AHSOKA TANO - (321125) RESEARCH ASST I EDIT HEADER REC

Regular Employee - Salaried FT Exempt - StaffR

Fundcenter	Sub-Description	Business Area	Source Amt	Fringe	Comment	Fiscal Period	DEL	CC
2539505101		7100	50	$ 4	cell phone allowance	1		
2539505101		7100	50	$ 4	cell phone allowance	2		
2539505101		7100	50	$ 4	cell phone allowance	3		
2539505101		7100	50	$ 4	cell phone allowance	4		
2539505101		7100	50	$ 4	cell phone allowance	5		
2539505101		7100	50	$ 4	cell phone allowance	6		
2539505101		7100	50	$ 4	cell phone allowance	7		
2539505101		7100	50	$ 4	cell phone allowance	8		
2539505101		7100	50	$ 4	cell phone allowance	9		
2539505101		7100	50	$ 4	cell phone allowance	10		
2539505101		7100	50	$ 4	cell phone allowance	11		
2539505101		7100	50	$ 4	cell phone allowance	12		
			0					

submit

Totals $ 600 $ 48

Don't worry about the blank line at the bottom – it's just there in case you need further entries! When you're done, just click the employee's name to return to the Employee Detail Screen, or a menu item to go elsewhere within Survivor.

Cost / Effort Distribution

The cost and effort distribution must be checked for each employee and the information entered here will flow into the Operating Budget.

The initial state of each employee's cost/effort distribution is derived from what is loaded in SAP at the time Survivor is initialized. For the sake of simplicity, we assume for faculty that effort matches cost at the starting point, but we know this is very likely to change.

There are a number of general validation-type rules to be followed besides your budget constraints, for example:

- You may not budget any salary or fringe on default accounts
- You must specify a specific TCH source for all TCH accounts
- Each BLOCK of cost/effort distribution must have the same start and end dates and must sum to 100% of salary and effort coverage
- Business areas for WBS elements cannot be changed (they will default to the Business Area assigned to them in SAP)
- You may only use valid fundcenters
- If you click "submit", any valid fundcenters with a "UNAVAILABLE: UNSELECTED" status in the Fundcenters Status Report will be automatically activated with a "AVAILABLE IN PROCESS" status.
- Numbers entered for percent of salary and fringe must not exceed 100 and may not extend beyond 2 decimal places – (e.g. 5.35 is ok, but 5.305 is NOT OK)

You MAY edit multiple lines at once by changing the editable fields including Fundcenter, Ext. Desc., Business Area, % of Sal, % of Effort, and Start and End date. You may also DELETE a line or lines at the same time you are editing others by checking the DEL box at the end of the row(s) you wish to delete.

Non-peds personnel expense documented support

A new feature for FY2018 is the ability to upload document support for use of non-peds sources. The BCM Budget Office requires written authorization from a department administrator for the use of non-peds sources to fund personnel expenses. In the past, this often meant searching through saved e-mails to locate said authorization or re-requesting the authorization at the time when merit increases are being processed, etc. With this new feature, users are able to store the documented support in Survivor on the employee/cost center line(s) to which it pertains.

When requesting authorization to use non-peds sources of the non-peds administrator, it is best to be as specific as possible regarding the affected employees, sources and salaries as well as considration for merit increases in the upcoming year. For example:

Dear Mr./Ms. Administrator,

In accordance with the BCM Budget office guidelines, we are requesting written authorization for the use of 9990012345-7200 for personnel support of ASHOKA TANO (321125) for 20% of her current salary which amounts to $7,600 salary and associated fringe. Additionally, please indicate whether the source will allow up to a 5% increase during the upcoming FY.

Thanks,

Peds admin for galactic pharmaceutical research

When the admin replies with their approval, the return e-mail may be saved in a .pdf format and uploaded directly into SAP as indicated below. In this case, if the section decides to give the employee less than 5%, they are still covered by the authorization.

To upload your .pdf document, navigate to the Employee Detail Screen for the user. Locate the distribution line for the non-peds source and click "Add" at the far right in the "Auth" column:

Fundcenter	Description	Sub-Description	Business Area	% of SAL	Source Amt	Fringe	Start Date	End Date	DEL	Auth
9990012345	DROIDEKA SENTINAL RESEARCH		7220	20	$7,600.00	$3,025.00	Jul / 1 / 2017	Jun / 30 / 2018		Add
2539505101	DAMERON-UNRESTRICTED		8300	80	$30,400.00	$12,105.00	Jul / 1 / 2017	Jun / 30 / 2018		
								submit		

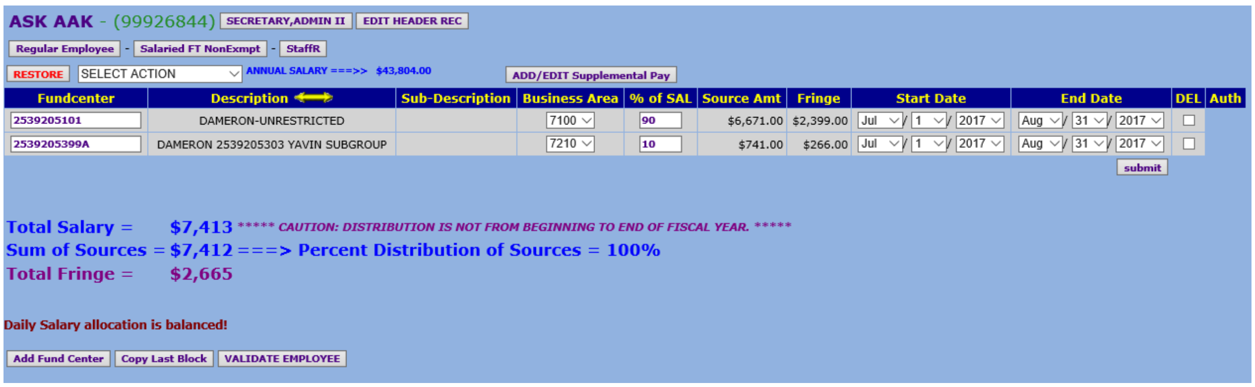
Navigate using Browse to locate the saved .pdf (on your desktop or network folder) and click Submit to upload it. Once uploaded, the "Add" under Auth will now read "View / Replace" indicated a document has been saved and, of course, users are able to View or Replace the document as needed.

Note that users only need to upload one document for all instances of a non-peds source for a particular employee and if there are multiple distribution blocks, they will all read "View / Replace" accordingly once the appropriate document has been uploaded.

Replace works the same as "Add" and overwrites any previously saved document. There are no copies kept for prior versions.

Copy Last Block

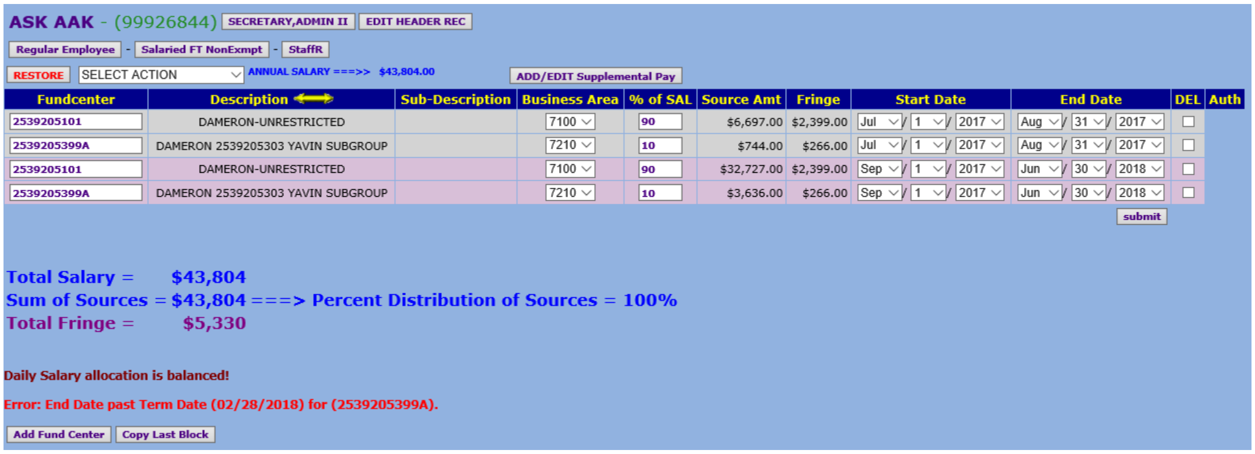
BEST PRACTICE for doing the cost/effort distribution is to start with the 7/1 entries and get them correct including the END DATE. So, for example, if your employee is charged to a WBS Element/Forecast which ends on 8/31, make 8/31 the end date for all of your rows:



Then, use the Copy Last Block button and make Sep 1 the start date for the next block:

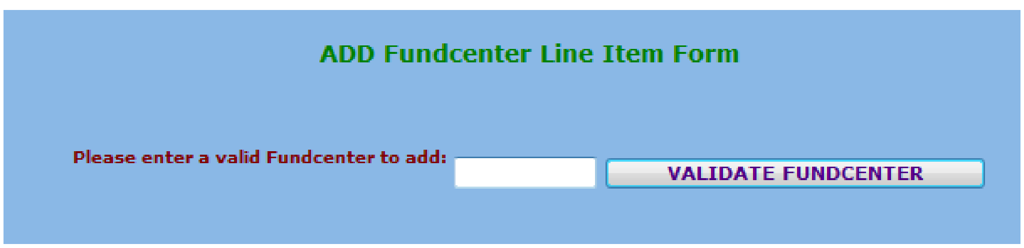
And click Submit.

This will copy ALL of the rows from your first block and provide them all in a second block. Now, all you have to do is edit those that need editing such as the WBS Element which ends on 8/31!

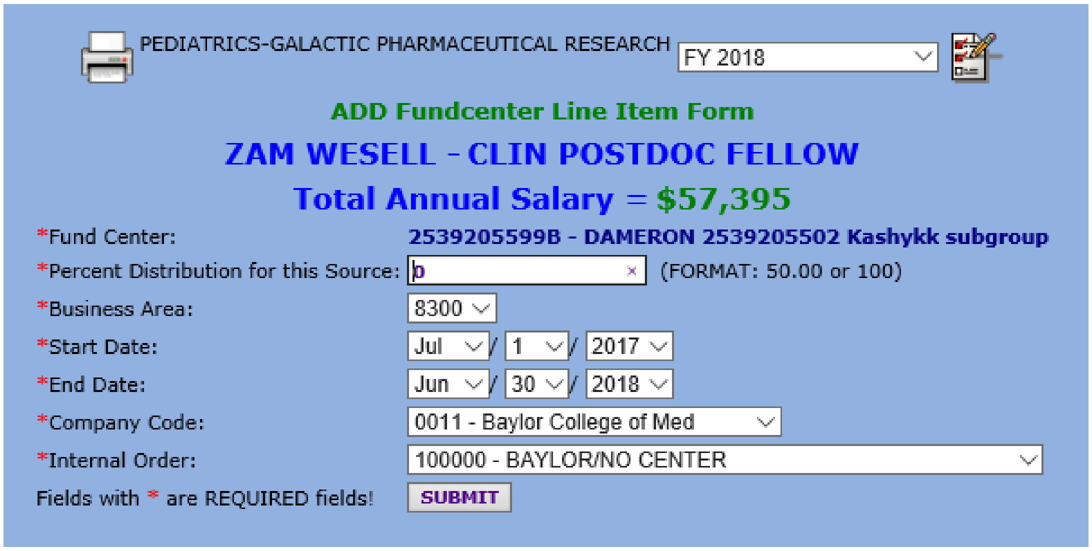


Adding an individual Fundcenter

Often you will need to add a fundcenter to the distribution. Click the Add Fund Center button at the bottom of the Employee Detail Screen. A simple one-field form comes up for you to enter a fundcenter. Fundcenters must be exactly ten digits and they are verified against the library of fundcenters available in SAP:



If the fundcenter you entered IS valid, you will see a screen with more options for the fundcenter you are entering:



PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH FY 2018

ADD Fundcenter Line Item Form

ZAM WESELL - CLIN POSTDOC FELLOW

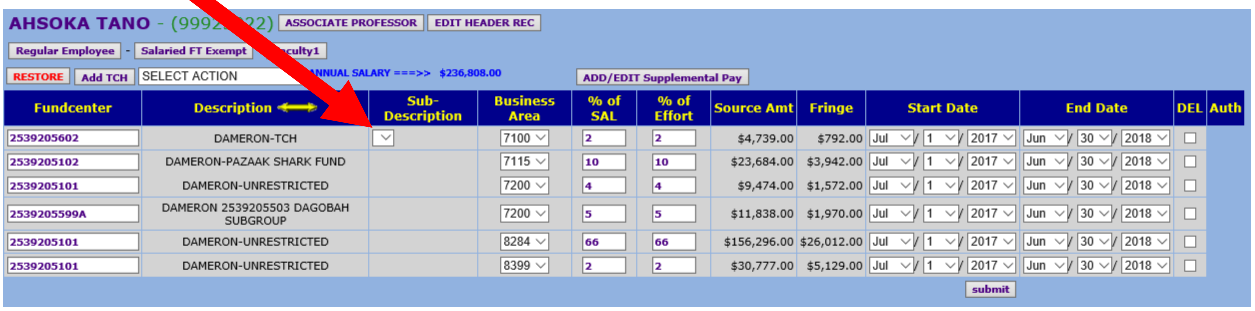
Total Annual Salary = $57,395

*Fund Center:	2539205599B - DAMERON 2539205502 Kashykk subgroup
*Percent Distribution for this Source:	0 (FORMAT: 50.00 or 100)
*Business Area:	8300
*Start Date:	Jul / 1 / 2017
*End Date:	Jun / 30 / 2018
*Company Code:	0011 - Baylor College of Med
*Internal Order:	100000 - BAYLOR/NO CENTER
Fields with * are REQUIRED fields!	SUBMIT

It is important that you enter a percent distribution. You can enter any value from .01 to 100 going out no more than two decimal places. Once added, fundcenters can also be easily edited in the Employee Detail Screen to change distribution percentages, business areas, and dates.

Adding a TCH acct

TCH accounts require the assignment of a specific TCH account. You will notice that you will have a selector box available to you whenever you have TCH Sources by Fundcenter:



Fundcenter	Description	Sub-Description	Business Area	% of SAL	% of Effort	Source Amt	Fringe	Start Date	End Date	DEL	Auth
2539205602	DAMERON-TCH		7100	2	2	$4,739.00	$792.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205102	DAMERON-PAZAAK SHARK FUND		7115	10	10	$23,684.00	$3,942.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205101	DAMERON-UNRESTRICTED		7200	4	4	$9,474.00	$1,572.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205599A	DAMERON 2539205503 DAGOBAH SUBGROUP		7200	5	5	$11,838.00	$1,970.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205101	DAMERON-UNRESTRICTED		8284	66	66	$156,296.00	$26,012.00	Jul / 1 / 2017	Jun / 30 / 2018		
2539205101	DAMERON-UNRESTRICTED		8399	2	2	$30,777.00	$5,129.00	Jul / 1 / 2017	Jun / 30 / 2018		

You may select from the drop-down selector. But if the TCH account you need is not an option on the drop-down, click on the **Add TCH** button above the distribution rows. You will see a screen similar to this:

You may select the appropriate TCH account from the selector and click submit. If the TCH account you need is not available in this big list, you will need to contact the department administrator for guidance. After you click submit, you will be brought back to the Employee Detail Screen where you will now be able to select the TCH Account you just added from the drop-down selector.

RESTORE

Let's say that you have been working on a particular employee and, for whatever reason, your dates are messed up, your amounts are messed up, you have errors out the wazoo and you wish to yourself, "Gee, if only I could start over on this employee from where I started!" Well, your fairy-godmother has granted your wish in this happy little RESTORE button! Simply click the button, then click "YES" to confirm that is REALLY what you want to do and, like magic, the employee will be restored to exactly how it was when you started the budget.

Great, you say, "what's the catch?" Well, there are a few things you should be aware of before you get too excited.

1) This cannot be done for employees you ADDED to Survivor.
2) There is no UNDO. This means that if you RESTORE someone in Survivor, everything you did to them is erased permanently.

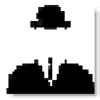
Validating an Employee

If you have finished with your Employee Actions and have balanced your cost and effort distribution, you will happily see the magic button:

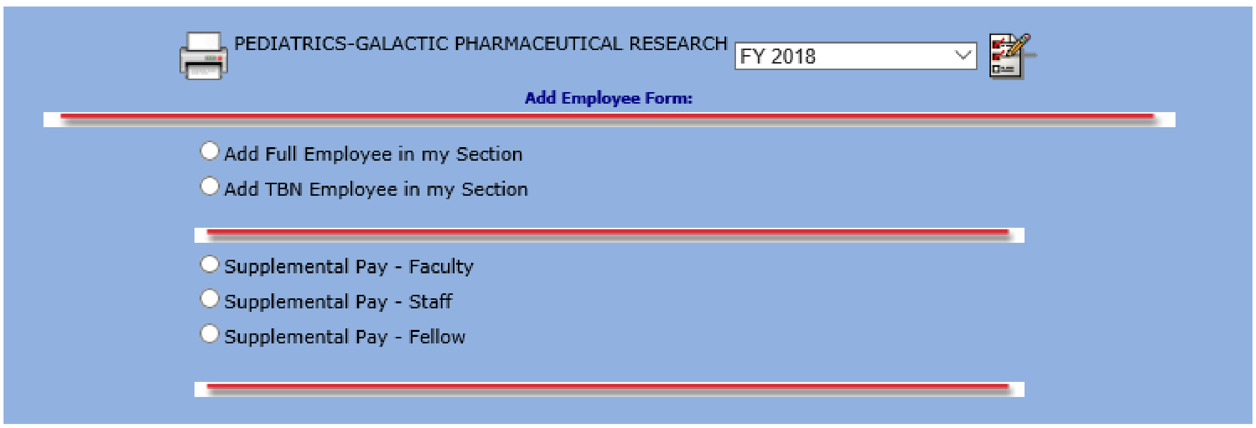
Click this button and you will be taken back to your Employee List to the joyous sound of applause for a job well done! And you will notice on the Employee List that this employee will no longer be shaded in gray. Way to go! Just remember that whenever you make ANY change to an employee's distribution or execute an Action on the Employee Detail Screen, your employee will revert to an un-validated state and you will need to re-validate before you can submit your salary budget.

This feature ensures that you have reviewed and approved the distribution and status of all employees in your orgunit(s).

Add an Employee

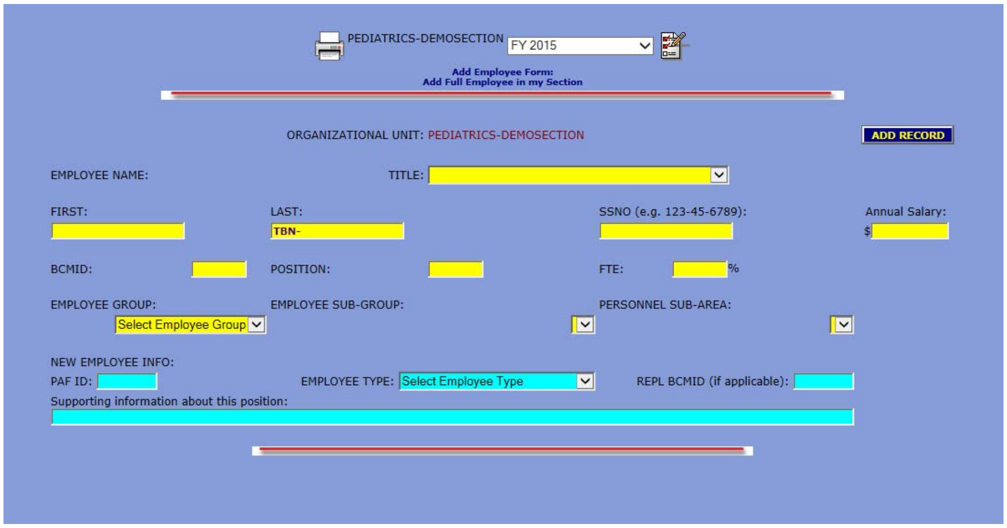
Remember my favorite icon ?

The guy's not there, so you have to ADD him!! And you may need to add some people in your org unit too! When you click this icon (found on the Employee List and the Employee List Detail screens), you are given a number of radio-button options to select from:



First Option – Add Full Employee in my Section

You will only use this option if you are adding an employee who has a valid BCMID. Presumably the employee was NOT an employee when we initialized Survivor, but has since been hired and you have complete information including BCMID, Position number, and Social Security number.


PEDIATRICS-DEMOSECTION FY 2015

Add Employee Form:
Add Full Employee in my Section

ORGANIZATIONAL UNIT: PEDIATRICS-DEMOSECTION

ADD RECORD

EMPLOYEE NAME: TITLE:

FIRST: LAST: TBN- SSNO (e.g. 123-45-6789): Annual Salary: $

BCMID: POSITION: FTE: %

EMPLOYEE GROUP: Select Employee Group EMPLOYEE SUB-GROUP: PERSONNEL SUB-AREA:

NEW EMPLOYEE INFO:
PAF ID: EMPLOYEE TYPE: Select Employee Type REPL BCMID (if applicable):
Supporting information about this position:

Select the Title and enter first name, last name, SSNO, Annual Salary, BCMID, Position number, and FTE. Then you will select Employee Group, Sub-group, and sub-area.

You must select Group, Sub-group, and sub-area in that order as each subsequent selector is populated based on the option selected in the prior box for validity purposes.

The add employee function also has fairly strict error-checking and, after you click the “Add Record” button, you may encounter any number of errors. Fear not, however, for these errors are usually quite explanatory and should provide you with ample information on what was wrong and guide you in how it should be corrected.

Some examples might be incorrect salary for pay-grade, invalid selection of sub-group for the FTE that was entered, incorrect title for the sub-area selection, etc.

Also, the BCMID is checked against the Survivor database, so it HAS to be a unique BCMID. In other words, you will NOT use ADD an employee to re-enter an employee you have removed from the budget. To do that, visit the “Removed from Budget” report under Salary Reports. There you will see all employees that have been removed from the budget and you will have the option to RESTORE from there.

Second Option – Add TBN Employee in my Section

You will use this option when you are planning to hire anytime prior to or during the FY, but the person has not yet been hired, so you do not have the information required by the first option. Using this option, you will not enter a BCMID, Position number, or SSNO, and it is important to understand that employees entered using this method will not have their data uploaded to SAP for Actions or Distribution.

This option has fields for First and Last names which can be used, if known, but you might also enter a more generic term when the future employee's name is not known (e.g. TBN – NURSE, LVN). We also advise that you literally enter "TBN" as the first three letters of the last name so that your "To be Named" employees will group together on your Employee List which is sorted alphabetically by last name.

The same restrictions for entering a valid employee as mentioned in Option 1 apply to this option, as well.

"Supplemental" Pay

This option is intended for large general Supplemental pay pools such as Moonlighting. For individual supplemental pay, such as mobile phone coverage, use the Supplemental pay feature in the Employee Detail Screen.

Here you are able to enter a supplemental pay amount which will look like a generic faculty, staff, or fellow and calculate fringe at the appropriate rate.

Reports

You will notice similarities to many different reports in that, although you might be running reports that SELECT different data, the layouts are quite similar. Therefore, the descriptions of the various reports below will focus on unique aspects of the individual reports or clarify the selection criteria, but will not reiterate the basic layout of every report. Most reports can be downloaded to Excel by clicking the Excel icon at the top of the screen.

Most reports in the SALARY part of Survivor are similar either to the Employee List, in that they are a general list of Employees showing titles and annual salary, or they are similar to the Employee List Detail, showing the detail cost/effort entries for the selection criteria. Exceptions are noted below.

The Salary Reports screen is organized into two basic sections. The top portion concerns primarily actions reports such as promotions, terminations, increases, etc. while the lower portion concerns primarily account usage for cost and effort distributions.

Employee Actions Reports:

New Hires & New Hires Detail

The New Hires report conveniently displays all employees that have been added into the budget tool using any of the Add Employee options. Clicking on "New Hires" will display a simple list similar to the Employee List, whereas clicking on the "Detail" at the end of "New Hires Detail" will bring up a report more like the Employee List Detail, showing you cost/effort distribution along with the names.

Clicking the "TBN Only" radio button will limit your report to only those whose last names start with "TBN". Using "TBN" as the first three letters of the last name is also a good way to group your "To Be Named" employees on all reports and it assissts the department in projecting and communicating our future needs to BCM and TCH, so please use this convention!

Promotions

The Promotions report will list all employees in the selected org unit who have had a promotion action entered in Survivor. The report lists the old Title with Annual Salary along with the new Title with annual salary.

Removed From Budget

Employees who are terminating from employ prior to 7/1 will be removed via the "Remove from budget" action as well as employees added mistakenly or intentionally. You may run the Removed From Budget report to review these. If you need to reinstate an employee mistakenly removed, you may do so by clicking the RESTORE button on this report. This will only work for employees who were loaded into Survivor during initialization. You cannot RESTORE a 'NEW' employee that was manually added to Survivor.

All Salary Increases

The All Salary Increases report will list all of your employees and indicate their old salary, new salary, percent increase (if any), along with the reason code and explanation (if any). Not that you can limit this report to only the employees with non-zero salary changes by clicking the radio button at the top of the report.

FTE Changes Report

The FTE Changes Report will list all employees in the org unit whose FTE has changed since they were loaded into the tool.

Uncombined Distribution Records

The description that comes up on this report explains it pretty well:

"This report lists employees whose records need to be reviewed prior to upload to BPC because of the need to combine distribution records that match in terms of BCM_ID, Start_Date, Fundcenter, and Bus_Area. -- if there are none listed, that is a good thing."

In other words, if you have, on one employee more than one line in a block using the same fundcenter and same business area, that is NOT good and should be changed. The exception to this is your TCH and Forecast accounts which may be differentiated by the TCH Acct number or the Forecast Account description respectively and will be combined for BCM purposes as the data is rolled into BPC.

Salary Cap Report

By running the Salary Cap Report, you can, in one place, identify all of the Salary Cap Violotions in your orgunit. Please be advised that Sal Cap violations will also be indicated as you view the Employee Detail Screen for an employee with such a violation and these employees' Survivor records will not be able to be validated until the violation is removed (by reducing cost or increasing effort).

0027 Entry Cost/Efft

The 0027 Entry Cost/Efft report is an all-in-one place kind of report. It displays not only the full cost/effort distribution for all of the employees in your orgunit, but also their original and new salary along with the percent increase and it does include most header information as well (title, position, etc.)

Invalid Dates Report

The Invalid Dates Report will indicate all instances where employees in your orgunits are budgeted on grants beyond the grant term dates.

Account Salary Usage Reports:

CURRENT SALARY STATUS SUMMARY

This 'report' actually links back to the same summary the "Exp Summary" link on the top navigation takes you to. It is here that you must verify that all of your records have been validated. When this is the case, there will be a magic button like the one below:

CLICK HERE TO SUBMIT AND LOCK YOUR SALARY BUDGET: GO!

See the next section (After reports) for more information about this screen and submitting and locking your Salary Budget.

UNRESTRICTED COST CENTERS:

Default Account

You may not submit your budget if any employees are charged to your default account. This report will show all employees currently budgeted on your default. There is also a link to this report from the Expense Summary Screen ("Exp Summary") when there are still employees budgeted on Default accounts.

Forecast Account

Survivor makes tracking your account usage simple by equipping the user to name the specific forecast accounts, and this report provides detail usage as well as summary-level totals for each of your named Forecast accounts.

C Support

The unrestricted sources ending in '105" are called "C Support" and this report will provide information on employees budgeted on these accounts.

College Support

College support is the specific 2530002102 account and this report provides information on employees in your section budgeted from this source.

Other Unrestricted

This report will provide information on employees in your orgunit budgeted on unrestricted sources besides Default, Forecast, C Support, or College Support.

Non-Section Funds

It is advisable to communicate clearly with the administrators of the sections your employees are collaborating with. This report identifies all employees in your orgunit who are funded wholly or partially with dollars from other sections.

NON Peds Funds Usage

The NON Peds Funds Usage report brings data from BPC (The budget tool used by other BCM departments) showing how they have budgeted their employees using Pediatrics funds. The report is updated each morning during the BCM budget process – until all budgets are submitted.

TEMP RESTRICTED ACCTS:

Temporary Restricted

This report indicates usage of the 'Type 2' accounts for budget.

WBS ELEMENTS:

Federal Grants and Contracts

This report indicates usage of the 'Type 3' accounts for budget.

State and Local Grants and Contracts

This report indicates usage of the 'Type 4' accounts for budget.

Private Grants and Contracts

This report indicates usage of the 'Type 5' accounts for budget.

Plant Funds

This report indicates usage of the 'Type 8' accounts for budget.

AFFILIATED HOSPITALS

Texas Children's

The Texas Children's reports are useful to view TCH-funded employees in a couple of ways – by Person or by Account. The standard Texas Children's report is in alphabetical order and provides the TCH account, Section, BCMID, Name, Degrees, Title, Salary, percent, and business area for each distribution line – along with start/end dates.

By Person – Conveniently shows the TCH accts ordered and grouped by employee.

By Acct – Conveniently shows the TCH accts ordered and grouped by TCH Account.

Harris County Hospital District

This report shows all usage of accounts ending in "604".

Other Affiliated Hospitals

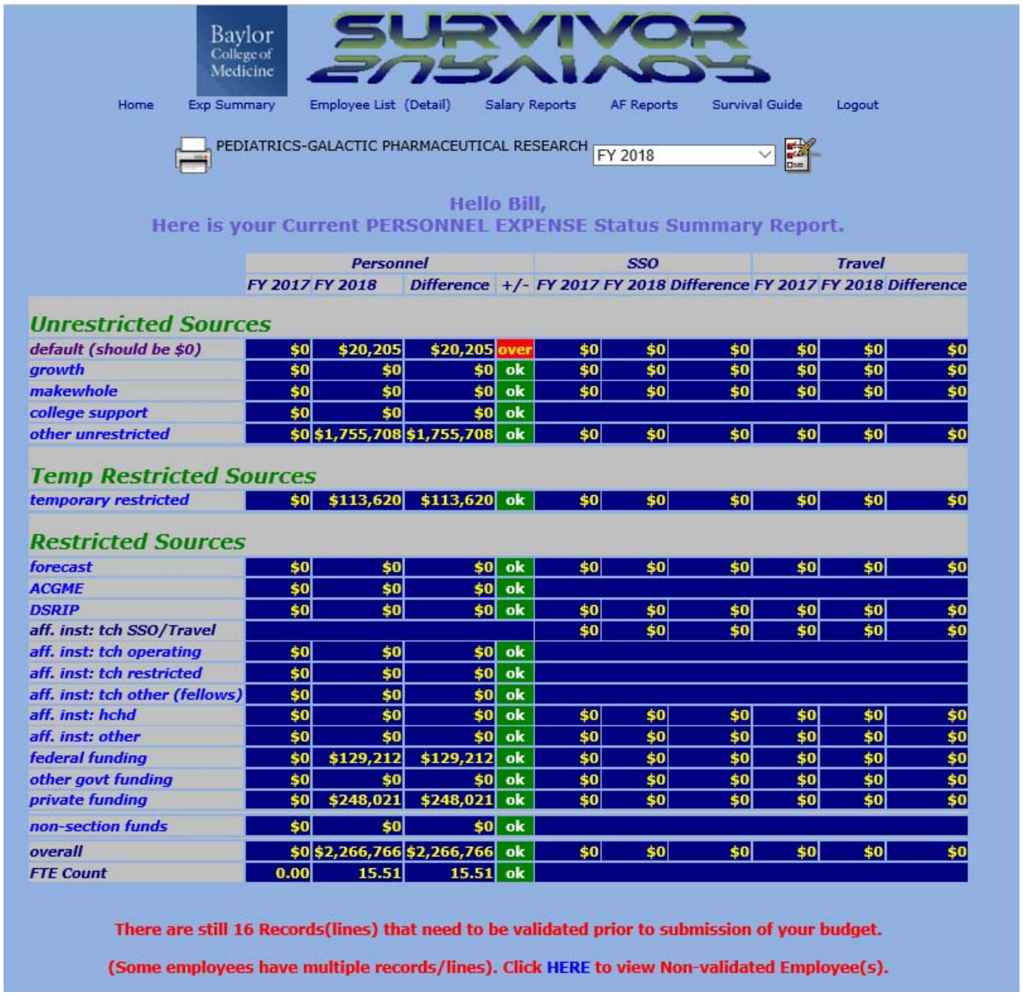
This report shows all usage of accounts in "6__" that are not TCH, DSRIP, St. Luke's, HCHD, or Methodist.

DSRIP

This report shows all usage of DSRIP accounts, if applicable, in your section.

Submitting and Locking Your Budget

In the previous section on reports, we mentioned the "Salary Status Summary Report" because besides being able to access this report (it's really more of a 'dashboard') from the Salary Reports menu, you can also get to this useful report simply by clicking the Exp Summary link on your top nav.



Baylor College of Medicine

Home Exp Summary Employee List (Detail) Salary Reports AF Reports Survival Guide Logout

PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH FY 2018

Hello Bill,
Here is your Current PERSONNEL EXPENSE Status Summary Report.

	Personnel				SSO			Travel		
	FY 2017	FY 2018	Difference	+/-	FY 2017	FY 2018	Difference	FY 2017	FY 2018	Difference
Unrestricted Sources										
default (should be $0)	$0	$20,205	$20,205	over	$0	$0	$0	$0	$0	$0
growth	$0	$0	$0	ok	$0	$0	$0	$0	$0	$0
makewhole	$0	$0	$0	ok	$0	$0	$0	$0	$0	$0
college support	$0	$0	$0	ok						
other unrestricted	$0	$1,755,708	$1,755,708	ok	$0	$0	$0	$0	$0	$0
Temp Restricted Sources										
temporary restricted	$0	$113,620	$113,620	ok	$0	$0	$0	$0	$0	$0
Restricted Sources										
forecast	$0	$0	$0	ok	$0	$0	$0	$0	$0	$0
ACGME	$0	$0	$0	ok						
DSRIP	$0	$0	$0	ok	$0	$0	$0	$0	$0	$0
aff. inst: tch SSO/Travel					$0	$0	$0	$0	$0	$0
aff. inst: tch operating	$0	$0	$0	ok						
aff. inst: tch restricted	$0	$0	$0	ok						
aff. inst: tch other (fellows)	$0	$0	$0	ok						
aff. inst: hchd	$0	$0	$0	ok	$0	$0	$0	$0	$0	$0
aff. inst: other	$0	$0	$0	ok	$0	$0	$0	$0	$0	$0
federal funding	$0	$129,212	$129,212	ok	$0	$0	$0	$0	$0	$0
other govt funding	$0	$0	$0	ok	$0	$0	$0	$0	$0	$0
private funding	$0	$248,021	$248,021	ok	$0	$0	$0	$0	$0	$0
non-section funds	$0	$0	$0	ok						
overall	$0	$2,266,766	$2,266,766	ok	$0	$0	$0	$0	$0	$0
FTE Count	0.00	15.51	15.51	ok						

There are still 16 Records(lines) that need to be validated prior to submission of your budget.

(Some employees have multiple records/lines). Click HERE to view Non-validated Employee(s).

And, as mentioned in the report section, all records must be validated before you will see the "magic button" allowing you to submit and complete your Salary Budget. Notice that the row headings are links to provide the detail usage information. In the example above, we can see in the +/- column that limits for default account are exceeded.

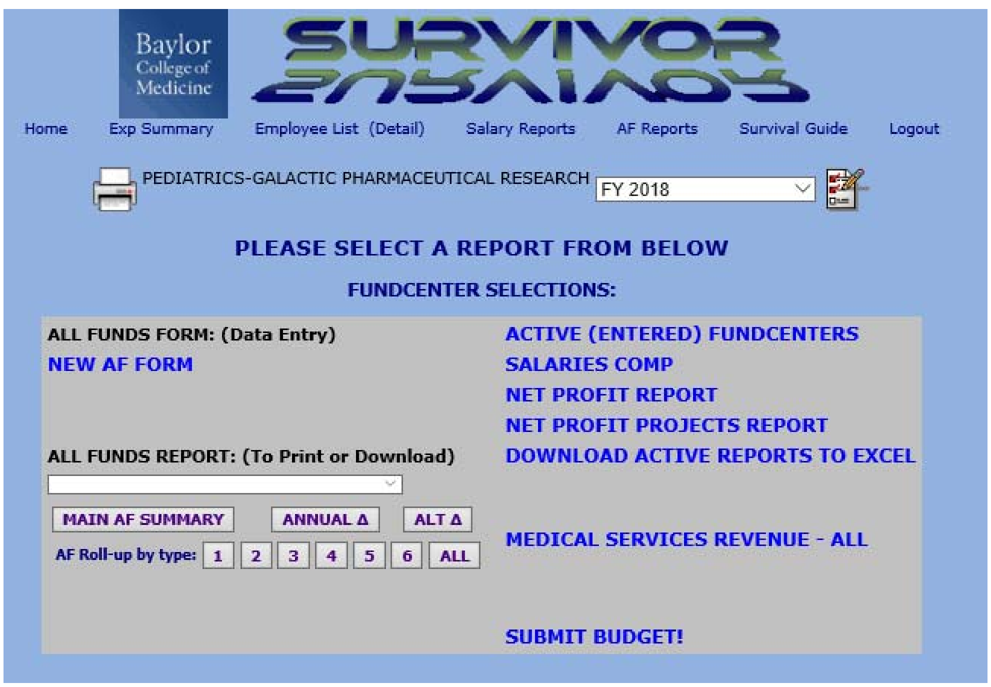
When you have validated all of the employees in your section and have no violations of limits, you will see the magic button and will be able to submit your Salary Budget and be able to begin working on your All Funds (operating) budget. This is the recommended order to do your budget 1) Complete Salary budget, 2) complete All Funds Budget.

Please remember that since the data flows from the Salary budget into the All Funds budget, ANY changes made in the salary budget will have to be addressed in the All Funds budget. This could affect one or many accounts, and may even affect other sections or departments.

Further, please note that once you have submitted your Salary Budget, it will be LOCKED from further editing. This includes other sections attempting to use sources from your section for salary/fringe.

All Funds Budget

Click on the "AF Reports" top nav to access Operating Budget entry and reports.



AF Form entry:

The AF Form entry is "New and Improved" for FY 2018!

There is only one area to enter information for your All Funds (Operating) budget, and it is the **AF Form entry screen**. However, users may reach this screen directly through the NEW AF FORM selector, or through links in some of the All Funds reports.

> *Ok, I lied. There's another area to enter All Funds budget amounts and it's useful when users do not need to see the figures from last FY, actuals, or current budget amounts. This is the "Quick Selection" AF Form entry screen. This form is used to enter specific amount in without the added overhead of pulling in personnel expenses, calculating offsetting revenue, or IDC. It's a great method to use when the user has multiple entries such as SSO, Travel, subcontracts, malpractice, etc. in multiple business areas.* ***When done entering numbers through the Quick Entry, though, it's highly recommended that you go back to the regular AF Form entry and click submit to balance everything out.***

Admins will complete the AF Form for each Fundcenter account they are budgeting for the upcoming Fiscal Year.

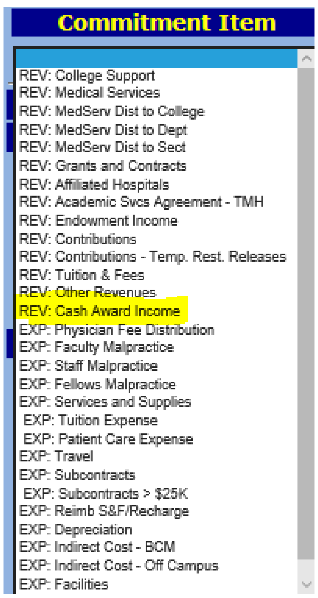
Salaries and Fringe are automatically pulled into the All Funds form from the Salary side of Survivor, and these fields are not editable. Additionally, Survivor automatically balances fundcenters to "net 0" by calculating revenues to offset expenses. Survivor now also automatically calculates indirect costs based on the IDC rates in grant header info (for all grants and cash awards).

Some general AF Budgeting rules:

- Net Zero by Business Area
- All account types 2-7 must Net Zero
- Expenses entered under "Indirect Cost – BCM" are automatically offset with revenues on the "Fac. & Admin. Recoveries (Indirect)" GL line
- Enter total SSO – these amounts will be broken out into Supplies, Services, and Other as Survivor loads the data into BPC

Cash Award Revenue

The IDC for Cash Awards is not calculated based on expenses as with other grants, but rather on any new Cash Award amounts that are recorded as revenue. Use the "REV: Cash Award Income" Commitment Item to record budgeted Cash Award revenue for the upcoming Fiscal year.



MAIN ALL FUNDS SUMMARY SCREEN

The Main All Funds Summary screen is the budget roll-up for the section putting all revenue and expense for all budgeted Fundcenter on one All Funds report. Users can click the amount links to show the fundcenters feeding into those amounts.

AF Roll-up by type

You can view overall summaries by fund type (e.g. all federal grants rolled up as type 3)

ALL FUNDS REPORT: (To Print or Download)

This is the individual account view of your Operating and Capital budget and will remain available for you to view in years to come.

REPORTS:

ACTIVE (ENTERED) FUNDCENTERS

Now links back to your Fundcenters Status Report.

SALARIES COMPARISON

Remember that changes in the Salary side of the budget do not automatically get updated in your AF Budget. It is not uncommon for there to be some changes to salaries or distribution even after you have started working on your AF budget or are even done. This report compares the allocations on the Salary side of Survivor with the budgets that have been udpated on the AF side of Survivor.

"New and Improved!" This report now automatically FIXES all salary/AF imbalances so that you no longer have to go in and make those changes. You might, however, need to to visit the fundcenters that were changed in order to rebalance your revenue offsets so that the account nets zero.

Salary Comparison to All Funds

PEDIATRICS-GALACTIC PHARMACEUTICAL RESEARCH FY 2018

The below listed tables (if any) show where there were discrepencies between the Personnel Expense numbers in your Salary Budget and the Personnel Expense numbers in the All Funds Budget. All of your distribution records have now been posted to the All Funds tables. For those accounts that have differences, you may need to make offsetting revenue entries, etc. Check the Net Profit Report to see accounts which do not net to zero.

2539205103	EDUCATION	RESEARCH	MED SVCS	AFF. PUBLIC	AFF. PRIVATE	PUB. SVC.	INST. SUPPORT
FACULTY SALARY	$0	- $57	$0	$0	$0	$0	$0
FACULTY FRINGE	$0	- $12	$0	$0	$0	$0	$0
STAFF SALARY	$0	- $23,521	$0	$0	$0	$0	$0
STAFF FRINGE	$0	- $7,147	$0	$0	$0	$0	$0
FELLOWS STIPENDS	$0	$0	- $4,415	$0	$0	$0	$0
FELLOWS FRINGE	$0	$0	- $1,071	$0	$0	$0	$0

2539205303	EDUCATION	RESEARCH	MED SVCS	AFF. PUBLIC	AFF. PRIVATE	PUB. SVC.	INST. SUPPORT
FACULTY SALARY	- $9,050	$0	$0	$0	$0	$0	$0
FACULTY FRINGE	- $1,391	$0	$0	$0	$0	$0	$0
STAFF SALARY	- $1,175	$0	$0	$0	$0	$0	$0
STAFF FRINGE	- $333	$0	$0	$0	$0	$0	$0
FELLOWS STIPENDS	$0	$0	$0	$0	$0	$0	$0
FELLOWS FRINGE	$0	$0	$0	$0	$0	$0	$0

2539205399A	EDUCATION	RESEARCH	MED SVCS	AFF. PUBLIC	AFF. PRIVATE	PUB. SVC.	INST. SUPPORT
FACULTY SALARY	$0	$0	$0	$0	$0	$0	$0
FACULTY FRINGE	$0	$0	$0	$0	$0	$0	$0
STAFF SALARY	$0	- $4,380	$0	$0	$0	$0	$0

You can click on the Fundcenter to take you to the AF Form where you can make any necessary changes and resubmit.

NET PROFIT REPORT

The Net Profit report will list total revenue and total expense only for each fundcenter in the orgunit. This report can also be filtered by Fund Type.

NET PROFIT PROJECTS REPORT

The Net Profit Projects Report is similar to the Net Profit report, but as it is designed for use with your WBS Elements, it only lists the G&C Revenue and breaks out expenses showing Fac. Adm., Other Expense and IDC (Both BCM and Off-Campus).

DOWNLOAD ACTIVE REPORTS TO EXCEL

This enables the user to easily drop budget AF reports into Excel.

MEDICAL SERVICES REVENUE – ALL

Detail AF report filtering only MSR.

SUBMIT BUDGET

New for FY 2018, you will need to click the "Mark Completed" for every fundcenter you are budgeting for the upcoming FY in the Fundcenters Status Report (Home) screen.

When you have completed the Salary Budget, and have submitted all of the Fundcenters you are budgeting for upcoming business year, AND you have marked all of your fundcenters as complete, you can click the Submit Budget button.

New WBS Elements

It is not uncommon for WBS Elements to be activated in SAP during the budgeting process. If you should enter a WBS Element into Survivor that is not accepted, but has valid dates during the upcoming budget year in SAP (check the grant header record first using SAP t-code CJ13), please send an e-mail to Bill Mohr (wmohr@bcm.edu) and it will be added.

New TCH Sources

Likewise, if a valid TCH source is not found on the list when you click "Add TCH" in the Employee Detail Screen, please send an e-mail to Bill Jones (williamj@bcm.edu) with the TCH Account number and copy Bill Mohr (wmohr@bcm.edu).

Locking/Unlocking

Once you have completed and submitted your budget, it is locked and cannot be edited. However, there may be times when you find that you missed something or need to make a correction. In such a case, please send an e-mail to Bill Mohr (wmohr@bcm.edu), Bill Jones (williamj@bcm.ed), or Joe Kanewske (kanewske@bcm.edu) and we will assist you.

What to do about ERRORS

GOOD errors

There are GOOD errors and BAD errors… ***GOOD*** errors are actually expected and should actually provide some valuable feedback in terms of something the user did which could be corrected to avoid the error in the future. Here is an example where the user was adding an employee, but entered a salary that exceeds the grade for that title:

DATA INCONSISTENCY DETECTED! PLEASE CLICK YOUR BACK BUTTON AND REVIEW ENTRIES.

ERROR: Annual Salary entered exceeds maximum allowable for grade. !

Error Code: SDPL250001

Your solution, when encountering an error like this, is simply to click your BACK button and correct your mistakes and move on already! Don't bother calling Bill or Linda unless you really take issue with the feedback the program is providing – in which case, we'll check it out.

BAD errors

Though it has never happened before, because everything is awesome! - There is a very remote possibility that you might encounter a program error. (gasp!!) In such a case, please send an e-mail to Bill Mohr (wmohr@bcm.edu) with a brief explanation of the actions and entries immediately preceding the error along with a screen shot of the error itself AND a screen shot of the screen right before the error happened.

Example e-mail:

To: wmohr@bcm.edu
From: afrustrateduser@bcm.edu

Bill, I was trying to run the New Hire Detail report:

BEFORE:

AFTER:

Please help as soon as possible because budgets were due yesterday and I've been on vacation, had a cold, my car broke down, my computer died, the electricity went out, there were terrorists, a hailstorm, fire, hurricane, FLOOD!! It's NOT MY FAULLTTTTT!!!!

A frustrated user