



Governor's Office of Planning and Budget

Budget Prep Training Manual



Budget Prep Training Manual

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Step 1: Basics

System Requirements

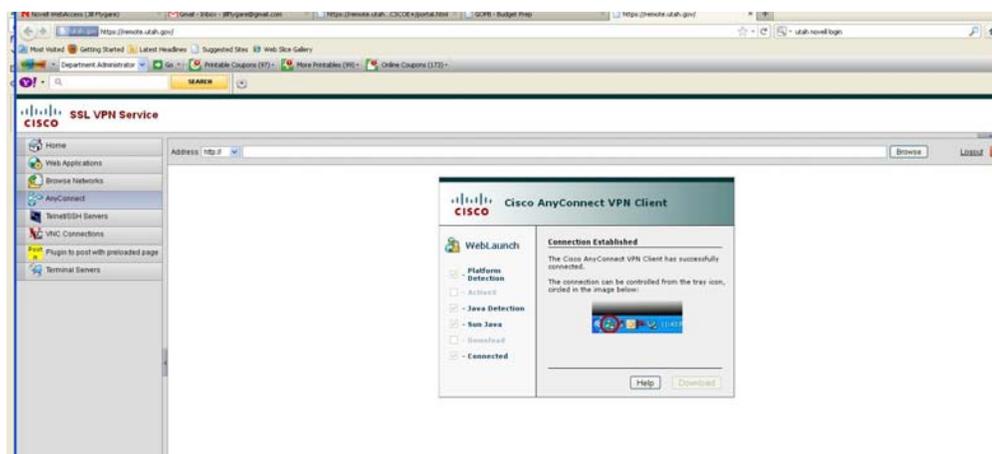
It is recommended that all users of Budget Prep use Mozilla Firefox. The system runs better using the Firefox browser. For reports to run properly you will need to enable pop-ups and you will need to have acrobat reader installed.

Logging into Budget Prep

1. To log into Budget Prep go to: <http://budgetprep.utah.gov>. This will take you to the login screen where you will use your network login and password.



2. To log into Budget Prep from home: go to <https://remote.utah.gov>. This will take you to a login screen where you will use the same network login and password you used above – once logged in you can access Budget Prep in a separate window just as though you were using it at the office.



**** If you are unfamiliar with Budget Prep you should begin by logging into the test system at <http://budgetprep.at.utah.gov> and familiarizing yourself with the system before entering any data into the production site.**

Logging out of Budget Prep

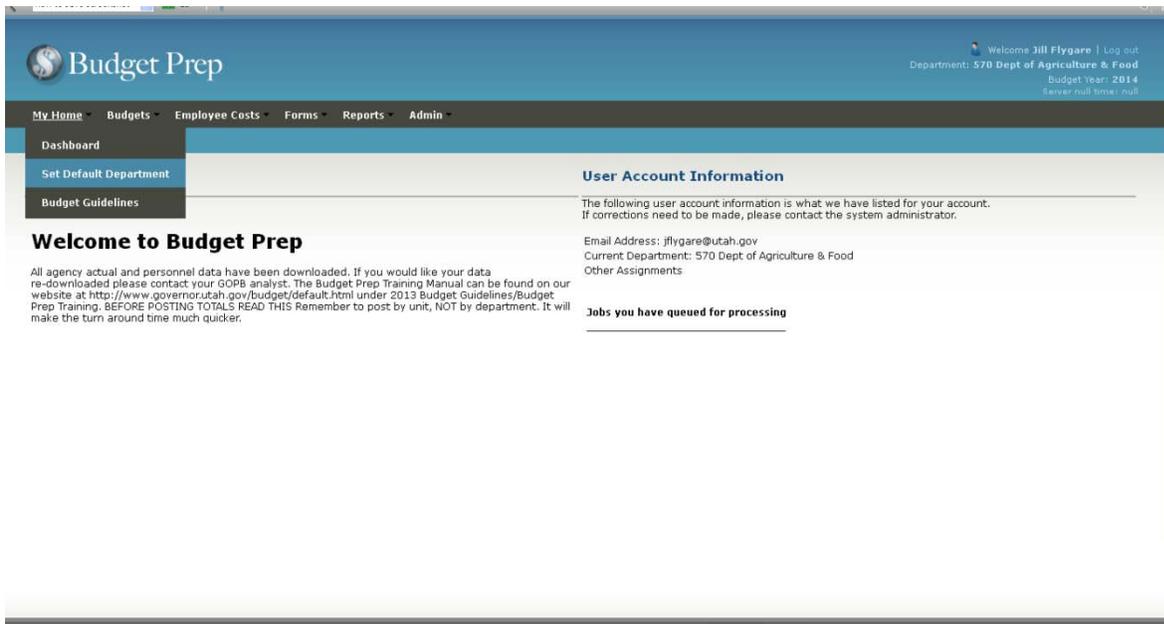
There are two options in logging out of the system:

1. Click on the logout button at the top right of the screen
2. Close the browser



Changing Departments

1. If you are assigned to more than one department budget, you will need to change the default department assignment whenever you begin working on a different budget.
2. From the menu bar select **My Home, Select Default Department**



3. From the drop down menu, choose the department you will be working with
4. Save

Budget Prep

Welcome Jill Flygare | Log out
Department: 570 Dept of Agriculture & Food
Budget Year: 2014
Server null time: null

My Home - Budgets - Employee Costs - Forms - Reports - Admin

Quick Links: [My Home](#)

News and Notices

Welcome to Budget Prep

All agency actual and personnel data have been downloaded. If you would like your data re-downloaded please contact your GPRS analyst. The Budget Prep Training website at <http://www.governor.utah.gov/budget/default.html> under the Prep Training. BEFORE POSTING TOTALS READ THIS Remember to post before making the turn around time much quicker.

User Account Information

The following user account information is what we have listed for your account. If corrections need to be made, please contact the system administrator.

Email Address: jflygare@utah.gov
Current Department: 570 Dept of Agriculture & Food
Other Assignments

Select Your Default Department

Departments:

- 200 Dept of Human Services
- <Please Select A Department>
- 020 Judicial Branch
- 060 Governor's Office
- 065 Utah Science Technology & Research Initiative
- 120 Tax Commission
- 200 Dept of Human Services
- 410 Dept of Corrections
- 430 Board of Pardons & Parole
- 660 Labor Commission
- 690 Dept of Insurance
- 710 Dept of Heritage & Arts

**NOTE: If you are only assigned to one department budget this will not affect you. Skip to the next step.*

Step 2: Administrative Tasks

Chart of Accounts

1. From menu bar select **Admin, Chart of Accounts**
2. You can filter your search results by one of the following: department pull down menu or account type pull down menu – allows you to search by Fund, Appropriation, Unit, and Revenue/Expense codes.
3. These screens are view only; you may not make any changes here.

Chart of Accounts

Choose what type you'd like to see and limit by the search field.

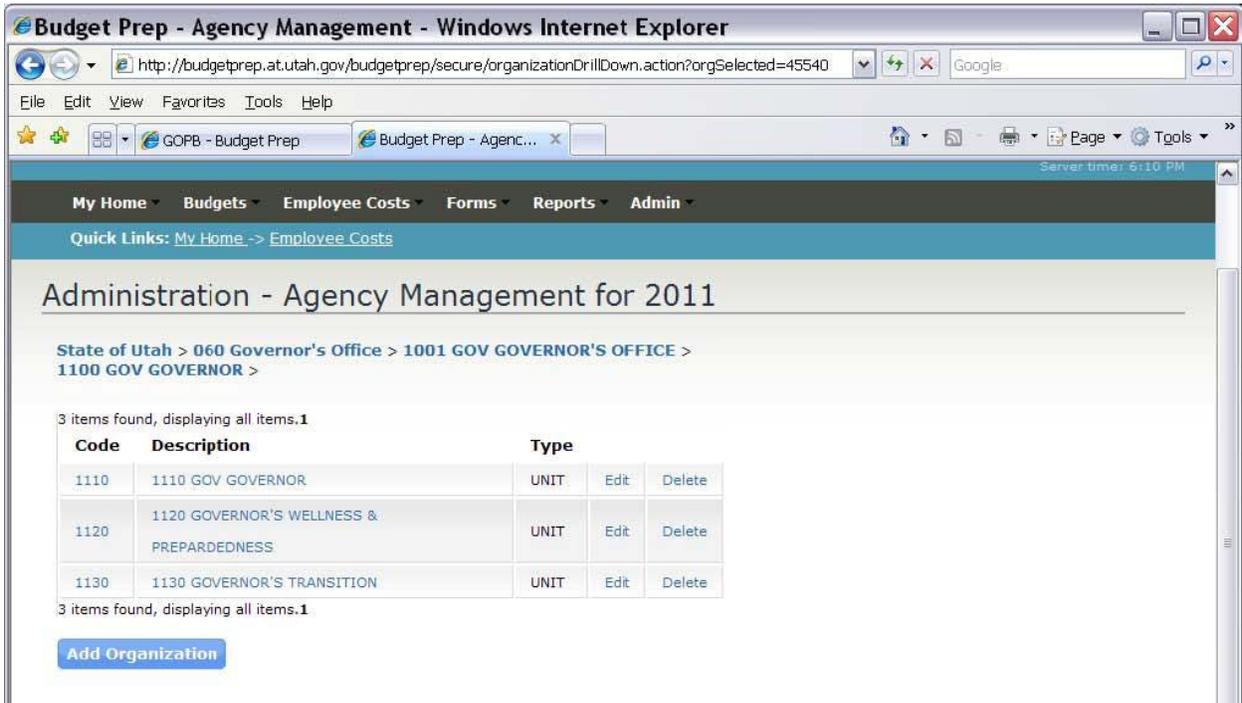
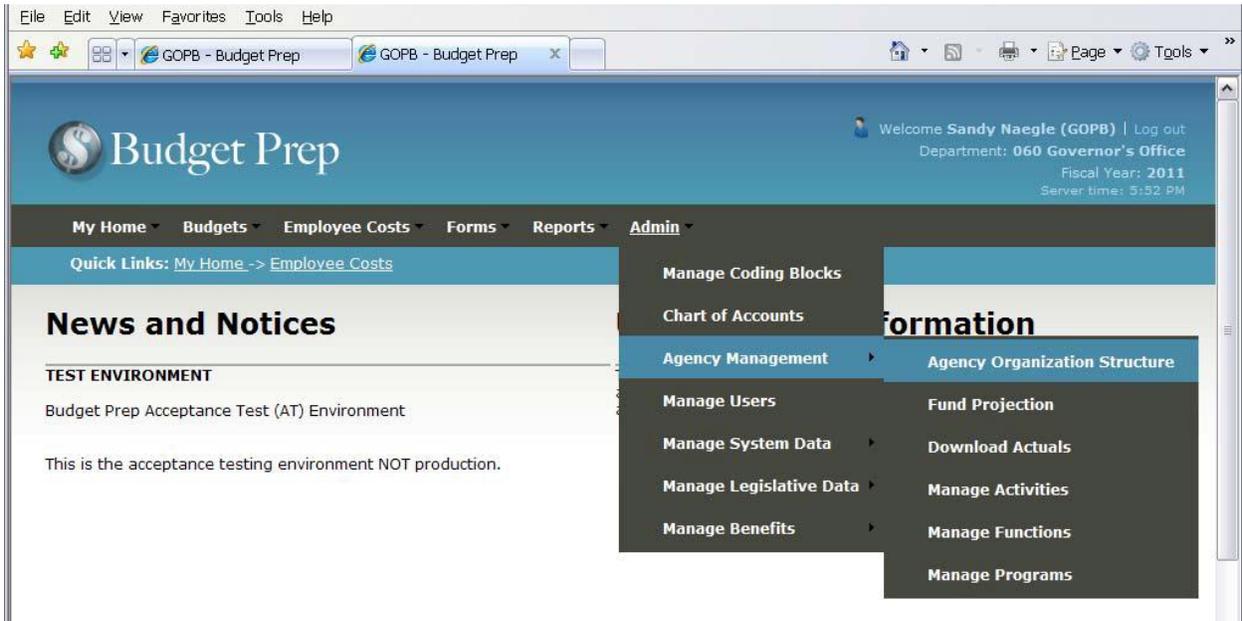
Department: 060 Governor's Office | Account Type: Fund | Search String: | Search

19 items found, displaying all items. 1

Name	Description
0120	0120 (FIN) Special Accounts F
1000	1000 (GF) General Fund Unres
1054	1054 (GOV) Industrial Assistance Account
1400	1400 (GOV) Criminal Forfeiture Restricted Account
1401	1401 (GOV) Business Development for Disadv Rural Comm Rest Acct
1402	1402 (GOV) Motion Picture Incentive Account
1403	1403 (GOV) Tourism Marketing Performance Account
1404	1404 (GOV) Stripper Well-Petroleum Violation Escrow
1407	1407 (GOV) Law Enforcement Operations Account
1408	1408 (GOV) Law Enforcement Services Account
2095	2095 (DAS) LeRay McAllister Critical Land Conservation Fund
2310	2310 (GOV) CCIJ Juvenile Accountability Incentive Block Grant Fund
2315	2315 (GOV) Crime Victim Reparations Fund
2320	2320 (GOV) State Elections Grant Fund

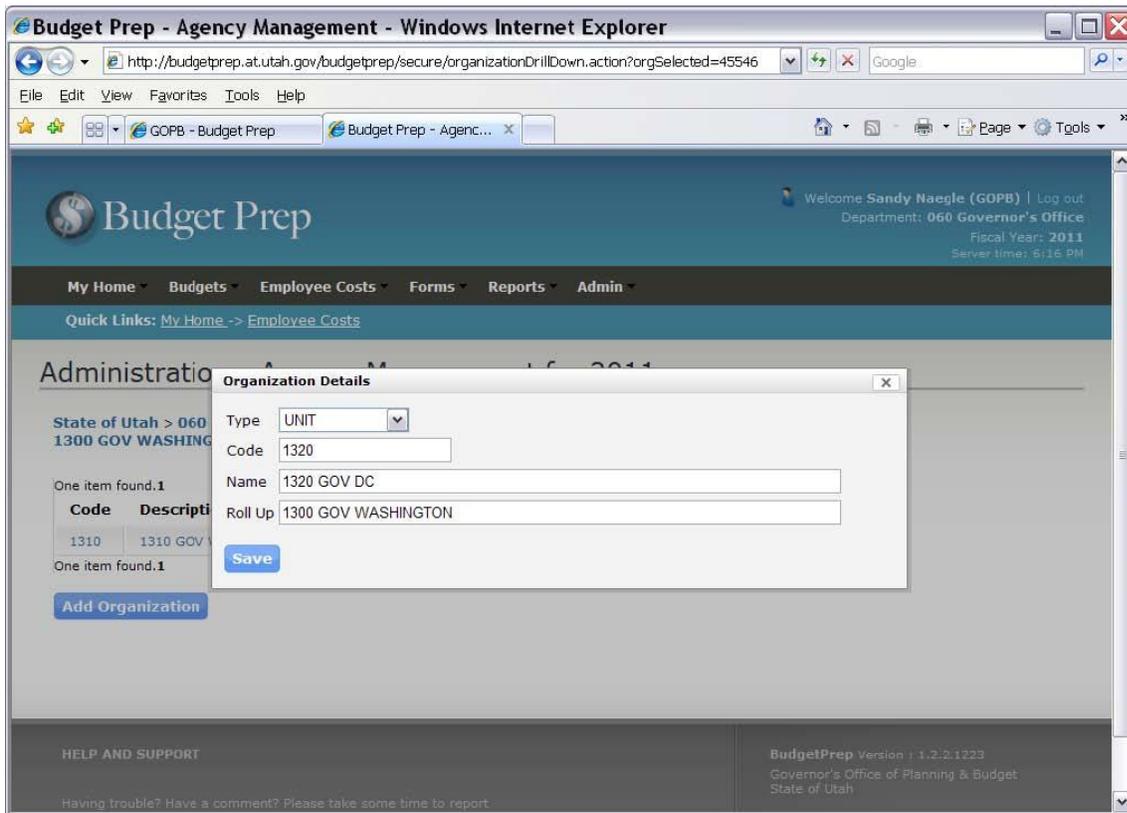
Agency Management

1. From the menu bar select, Admin, Agency Management, Agency Organization Structure



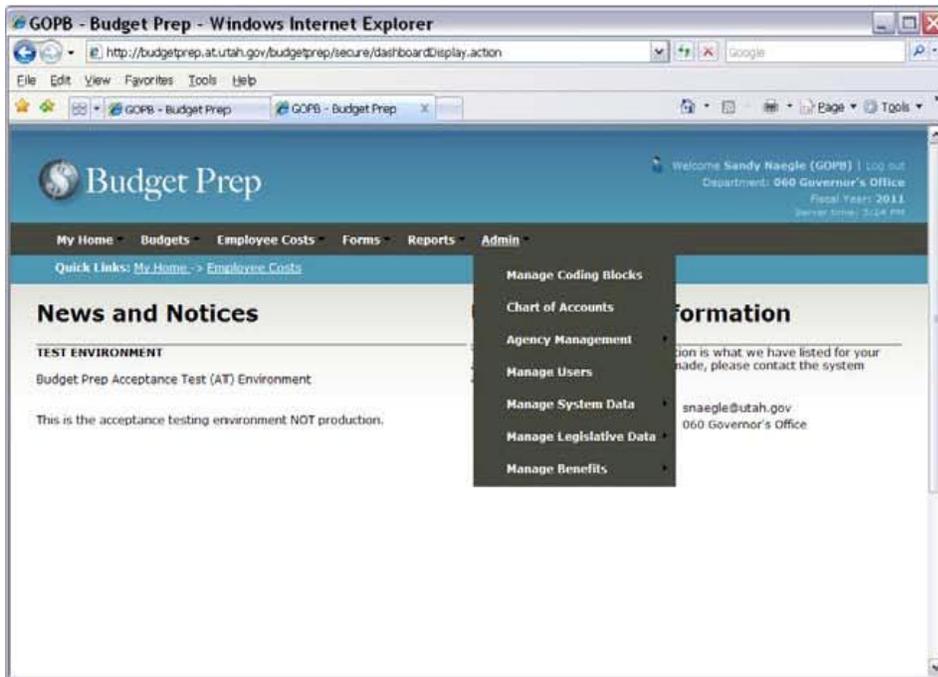
1. From here you are able to drill down from Department, to Division, to Group, to Unit by selecting description name.
2. At every level you can edit or delete a code
3. If you need to add a new coding block, make sure you are adding the code to the right roll up (the unit is rolling to the right group, division, or department) and **save**

4. To add – click add organization. A dialogue box will open
 - a. From the drop down menu you will most likely choose ‘unit’.
 - b. Type in the code associated with the new unit
 - c. Type in the Name of the new unit using the code number in the name
 - d. Make sure you are rolling to the correct place
 - e. Click **save**

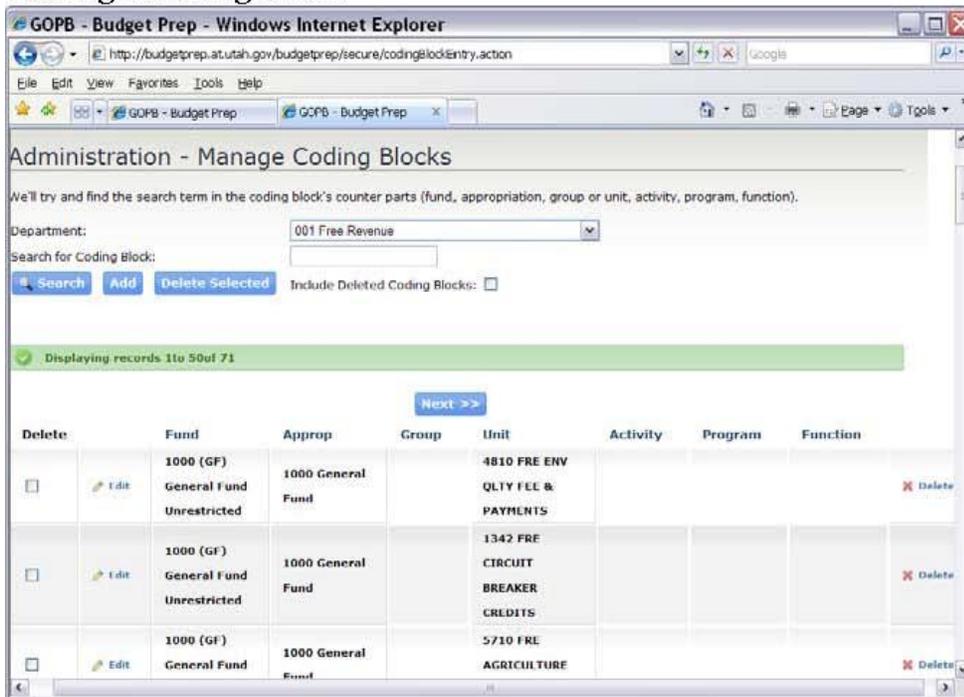


Manage Coding Blocks

1. From the menu bar select **Admin, Manage Coding Blocks**
2. From here you can delete multiple coding blocks by checking the box on the left and then clicking delete selected or you can delete one line at a time by clicking the 'X' delete on the right.



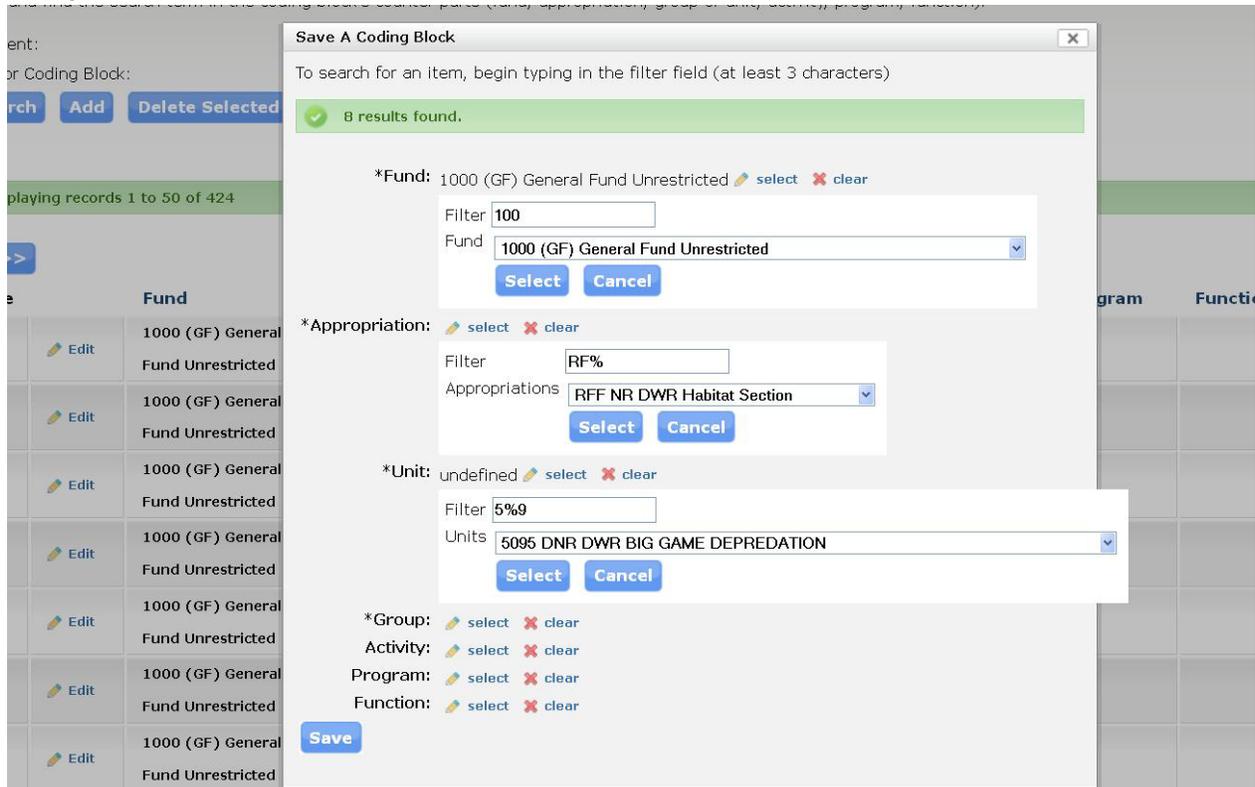
Manage Coding Block



1. There is an undo capability on this screen – click include deleted coding blocks, search. All deleted coding blocks will now appear in your list, in the 'edit' field it will say 'activate', click on it and that coding block will be available once again.
2. You can add a new coding block relationship by using the ADD button. This function MUST be used if a new unit is created. You will have broken relationships if you don't add a coding block.

3. *Note: You must have at least 3 characters in your search criteria. The percent sign (%) is considered a wildcard and may be used if you are unsure of the specific characters.* For example:
 - a. Fund - You know it is General Fund, enter 100 – 1000 General Fund drops down, click select
 - b. Appropriation - You know it is in Habitat, but you aren't sure the appropriation code, enter RF%
 - c. Unit - Enter the unit, 5%9

*Note: You cannot enter both a unit and a group; you must choose one or the other when adding a new coding block.

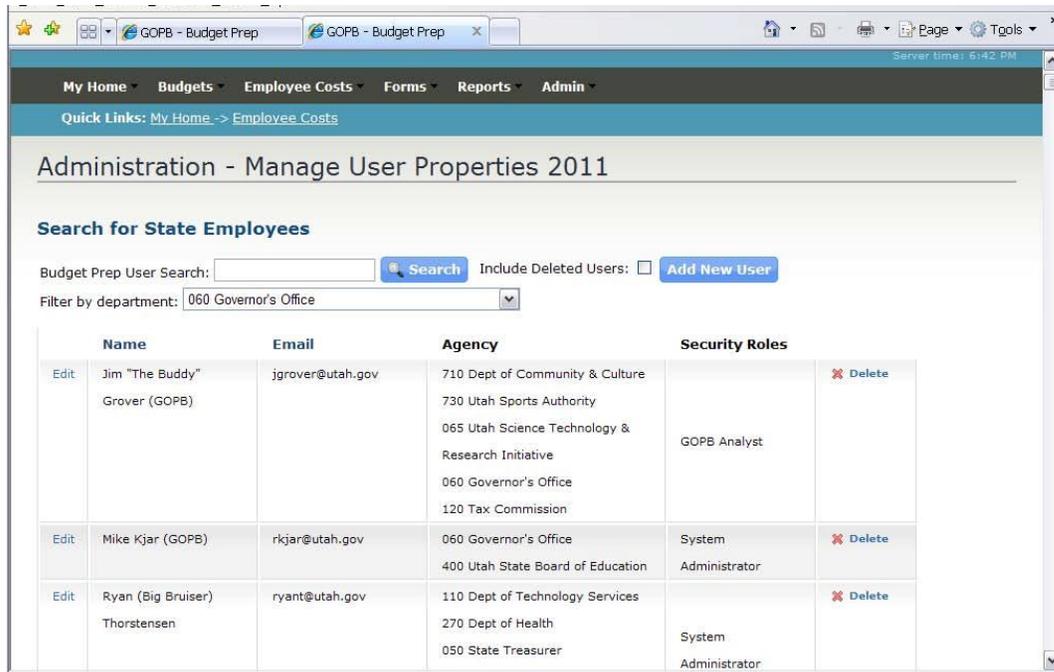


4. The more information you provide the narrower your search results will be.
5. A dialog box will display your options and populate the pull-down menu. Click the select button after making the appropriate choice in each area, click save.

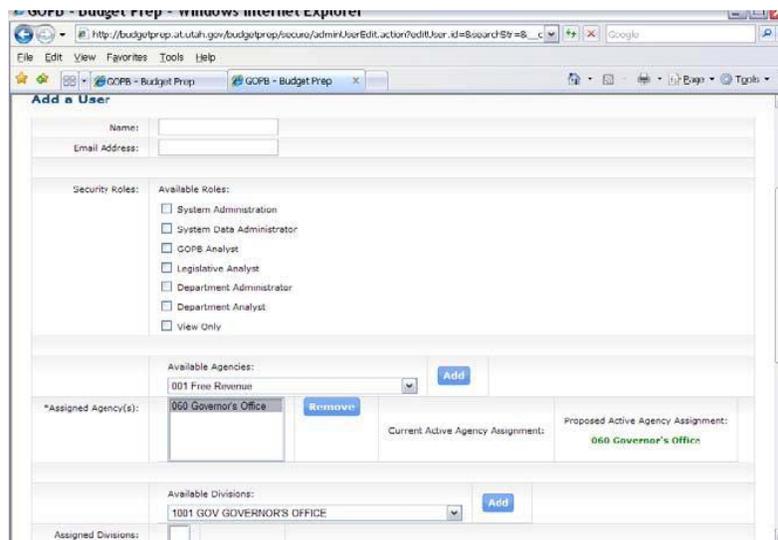
Manage Users

1. From the menu bar select Admin, Manage Users
2. Your search is filtered by department.
3. Review all department users for accuracy
 - a. Under 'Security Roles' look for those that say:
 - i. Department Administrator
 - ii. Department Analyst
 - iii. View Only
 - b. Are these accurate roles for these employees?
 - c. Delete any employees that no longer work for your agency – click delete

4. You can modify user roles by clicking 'edit' next to the individual you want to change. You can change their role (be careful who you give department administrative rights to), their assigned division, group, and/or unit, click **save**.



5. To add a new user:
 - a. Click Add new user
 - b. Type their name
 - c. Enter their email (must be their official Utah.gov email and use lower case letters)
 - d. Assign appropriate roles (Department Administrator, Department Analyst, View Only)
 - e. Assign division and group or unit range. If a user is only assigned one unit put the same unit in both the group and unit fields.
 - f. When finished, click **save**



Submit to GOPB

1. From the menu bar select **Budgets, Budget Request, Build Request**

Department Actions

Search for a Group/Unit Show Notes Column Copy Round Column Clear **Submit for GOPB Review** Request Budget Correction

Viewable Columns

Actuals What If 1 Authorized Requested Operating Working Budget

	Actuals(2012)	Authorized(2013)	Requested(2014)
General Fund	\$33,646,300.00	\$33,849,000.00	\$33,299,000.00
Education Fund	\$0.00	\$0.00	\$0.00
Restricted Fund	\$69,957,300.00	\$76,230,200.00	\$69,899,500.00
Transportation Fund	\$0.00	\$0.00	\$0.00
Total Funds	\$103,603,600.00	\$110,080,000.00	\$103,199,300.00

Revenue	Actuals(2012)	Authorized(2013)	Requested(2014)
GF General Fund	\$0.00	\$0.00	\$0.00
EF Education Fund	\$0.00	\$0.00	\$0.00
TF Transportation Fund	\$0.00	\$0.00	\$0.00
FF Federal Funds	\$0.00	\$0.00	\$0.00
DC Dedicated Credits	\$0.00	\$0.00	\$0.00
ML Mineral Lease	\$0.00	\$0.00	\$0.00

2. Click on Submit for GOPB Review, you can include a note with your submission on any peculiar aspects of your budget in the dialogue box that pops up.

Department Actions

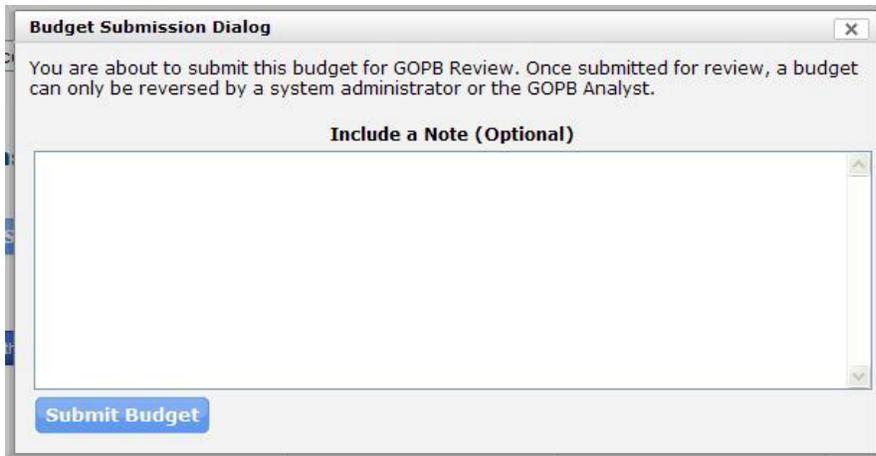
Search for a Group/Unit Show Notes Column Copy Round Column Clear **Submit for GOPB Review** Request Budget Correction

Viewable Columns

Actuals What If 1 Authorized Requested Operating Working Budget

	Actuals(2011)	Authorized(2012)	Requested(2013)
General Fund	\$0.00	\$0.00	\$0.00
Education Fund	\$0.00	\$0.00	\$0.00
Restricted Fund	\$0.00	\$0.00	\$0.00
Transportation Fund	\$0.00	\$0.00	\$0.00
Total Funds	\$0.00	\$0.00	\$0.00

Revenue	Actuals(2011)	Authorized(2012)	Requested(2013)
GF General Fund	\$0.00	\$0.00	\$0.00
EF Education Fund	\$0.00	\$0.00	\$0.00
TF Transportation Fund	\$0.00	\$0.00	\$0.00
FF Federal Funds	\$0.00	\$0.00	\$0.00
DC Dedicated Credits	\$0.00	\$0.00	\$0.00
ML Mineral Lease	\$0.00	\$0.00	\$0.00



- NOTE: Once you click Submit Budget it can only be reversed by a system administrator or your GOPB Analyst. Be sure you are ready to submit your budget.

Step 3: Set-up

Setting up your Category View

- From the menu bar select **Budgets, Budget Request, BR-Update my Category View**

	Actuals(2012)	Authorized(2013)	Requested(2014)
General Fund	\$33,646,300.00	\$33,849,800.00	\$33,299,800.00
Education Fund	\$0.00	\$0.00	\$0.00
Restricted Fund	\$69,957,300.00	\$76,230,200.00	\$69,899,500.00
Transportation Fund	\$0.00	\$0.00	\$0.00
Total Funds	\$103,603,600.00	\$110,080,000.00	\$103,199,300.00
Revenue			
GF General Fund	\$0.00	\$0.00	\$0.00
EF Education Fund	\$0.00	\$0.00	\$0.00
TF Transportation Fund	\$0.00	\$0.00	\$0.00
FF Federal Funds	\$0.00	\$0.00	\$0.00
DC Dedicated Credits	\$0.00	\$0.00	\$0.00

- The first time in Budget Prep, the screen will come up automatically.
- Complete this step before building your budget.
- The system default checks all Revenue and Expense categories. To de-select a specific Revenue or Expense category that is not used by your agency, click the box next to the appropriate category, click save my view.
- If you find that you need a Revenue or Expense category that you de-selected you may come back to this view, click on the box and save my view – your preferences will be restored.

- If you are out of balance it may be that you have funding in one of the categories you de-selected. Come back to this page and select all - this may help you find where you are out of balance.

Budget Prep 'My View Setup'

We know that not everyone needs to work with all these categories and objects, so we've added a personalized view feature called 'My View'. You can add/remove categories with a click of the button.

Revenue Categories	Expense Categories
<input checked="" type="checkbox"/> BB Beginning Balance	<input checked="" type="checkbox"/> AA Personnel Services
<input checked="" type="checkbox"/> CB Closing Balance	<input checked="" type="checkbox"/> BB Travel / In State
<input checked="" type="checkbox"/> DC Dedicated Credits	<input checked="" type="checkbox"/> CC Travel / Out State
<input checked="" type="checkbox"/> EF Education Fund	<input checked="" type="checkbox"/> DD Current Expense
<input checked="" type="checkbox"/> FF Federal Funds	<input checked="" type="checkbox"/> EE Data Proc Current Expense
<input checked="" type="checkbox"/> GF General Fund	<input checked="" type="checkbox"/> FF Data Proc Capital Expend
<input checked="" type="checkbox"/> LB Lapsing Balance	<input checked="" type="checkbox"/> GG Capital Expend (Except DP)
<input checked="" type="checkbox"/> ML Mineral Lease	<input checked="" type="checkbox"/> HH Other Charges / Pass Through
<input checked="" type="checkbox"/> PT Pass Through	<input checked="" type="checkbox"/> LL Cost of Goods Sold
<input checked="" type="checkbox"/> RR Restricted and Trust Funds	<input checked="" type="checkbox"/> NN Cost Accounts
<input checked="" type="checkbox"/> RT Transfers	<input checked="" type="checkbox"/> TA Trust & Agency Disbursements
<input checked="" type="checkbox"/> TF Transportation Fund	<input checked="" type="checkbox"/> TR Transfers

[Save My View](#)

Update your Object/Revenue View

- From the menu bar select **Budgets, Budget Request, BR-Update my Object/Revenue View**

Budget Prep 'My View Setup for Objects and Revenues'

My View Setup

Expand each of the categories by pushing the down arrow button. You will see all of the revenue/objects in your view. You can remove them by pushing the 'x' button. You can add new ones by typing a code or description under the appropriate category.

Have too many to add? Click the 'Add Defaults' button and all expense/revenues under your department that apply to them will be added automatically. This will not remove any that you have added already, just append to them.

[Add Revenue Defaults](#)

[Add Expense Defaults](#)

Revenue & Object Selection

REVENUES	
	GF General Fund

- All Revenue and Expense items used in your department for actual will be added. You can add additional Revenue and Expense items by clicking on the **Orange Arrow** to expand the bucket.

EXPENSES	
	AA Personnel Services
	BB Travel / In State
	CC Travel / Out State
	DD Current Expense
	EE Data Proc Current Expense
	FF Data Proc Capital Expnd

Once expanded, you can enter a value in the input field; the program will display any matching values. Click on the corresponding box for the Revenue/Expense you want added.

6407 Energy Conservation Improvements-Current Expense	
	<input type="text" value="6136"/>
 1 results found.	
	<input type="checkbox"/> 6136 Postage & Mailing
	EE Data Proc Current Expense

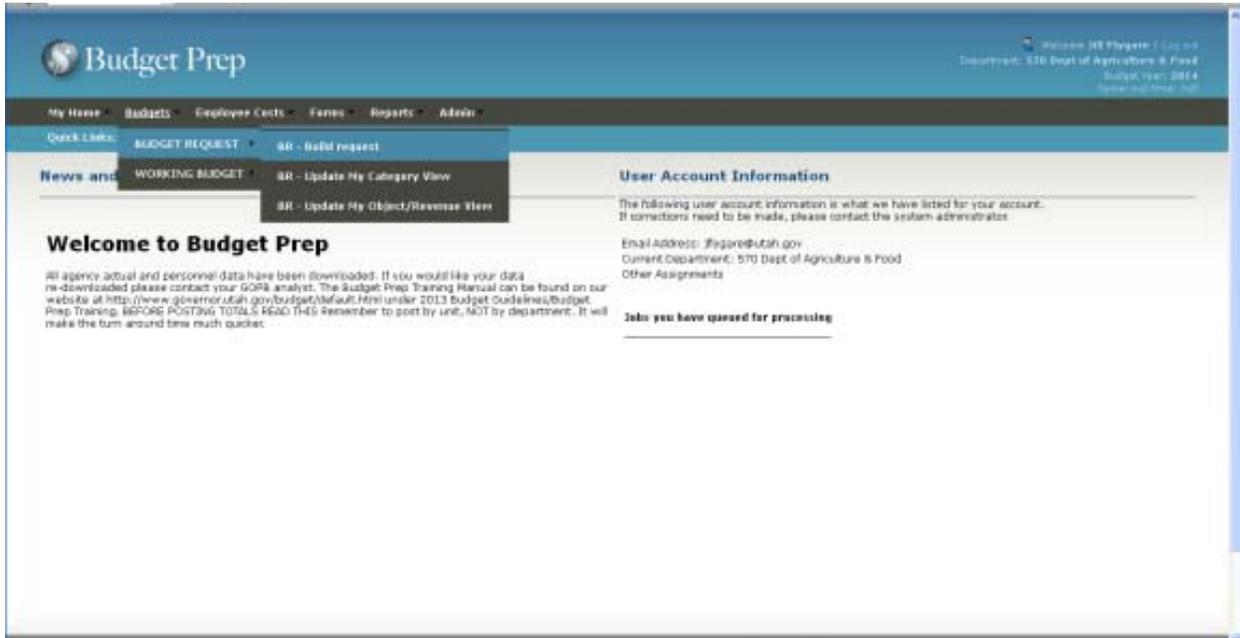
3. You can also delete Revenue and Expense items from your list by clicking the **Orange Arrow** and then clicking the **Orange X** next the Revenue/Expense you want deleted. **Warning: There is no warning message to confirm that you really want to delete, be sure you want to continue.**



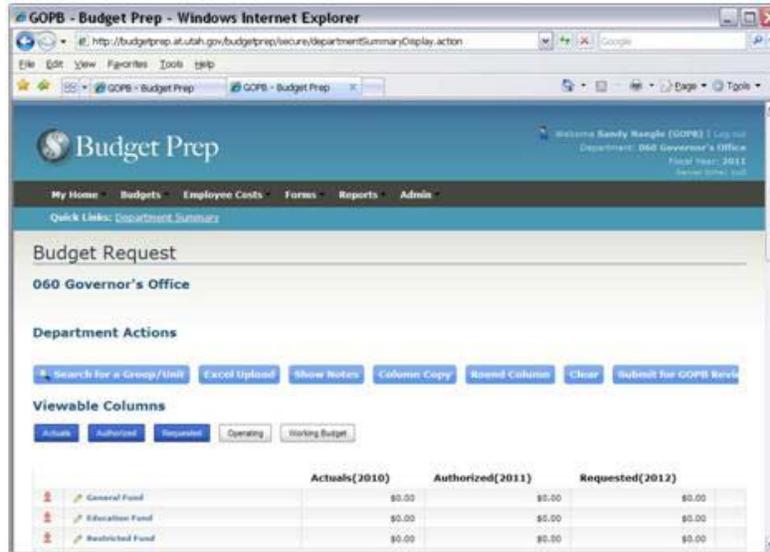
Step 4: Budget

Building your Budget

1. From the menu bar select **Budgets, Budget Request, BR-Build Request**

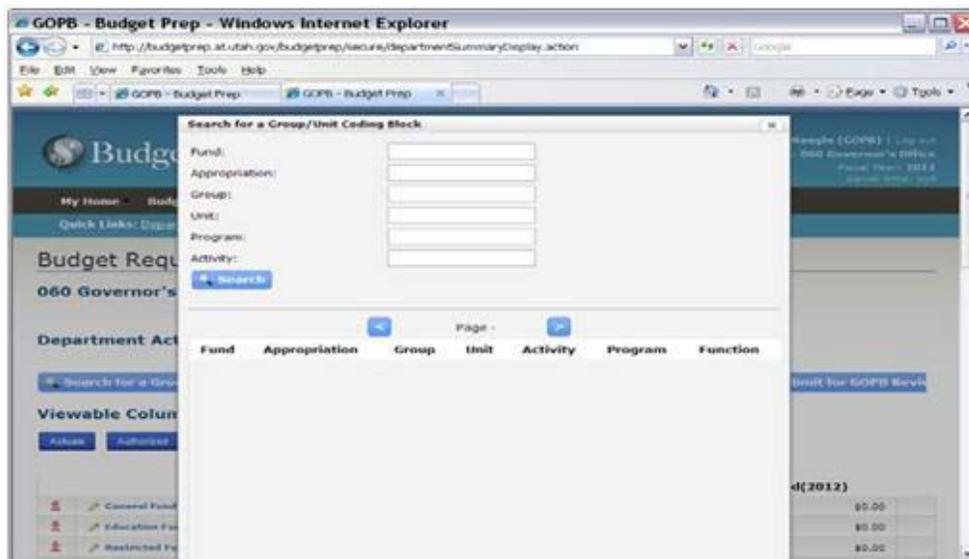


2. This screen is a summary of your entire department, there is no data entry capability here. However, you do have several options:
 - a. Search for Unit
 - b. Copy Columns
 - c. Round Columns
 - d. Clear Columns
 - e. Submit for GOPB review (Department Administrators only)
 - f. Determine your viewable columns – do this by clicking on the buttons
 - i. If the button is blue it is viewable, if it is white it is not.

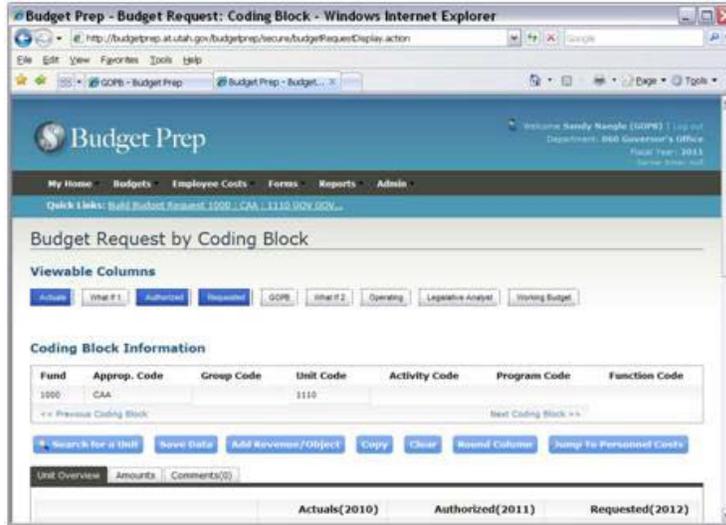


Entering Data in Budget Prep

1. From the menu bar select **Budgets, Budget Request, BR-Build Request**
2. From the Budget Request Category screen, select the **Search for a Unit/Group**
3. A dialog box will pop up allowing you to search for a unit by Fund, Appropriation, Group, Unit, Program, or Activity. It is recommended that you do not filter by more than two choices, click **Search**.
4. From the generated list, select the desired appropriation link. (The more narrow you make your filter, the smaller the return will be on your search).



5. This will bring you to the Coding Block page. At the top of the page you will see coding block information with the ability to move to the next or the previous coding block using the links provided.



6. You will also have access to **Search for additional units, Save Data, Add Revenue/Object Codes, Copy, Clear, and Round Columns, and Jump to Personnel** (identify personnel costs associated with each unit). *NOTE: There is no warning if you do not save your information before you leave this screen, remember to **SAVE your data**.
- Click on the blue buttons to perform any of the above functions.
 - To copy a column, click copy – choose what column you want copied and where you want it copied to.

	Actuals	Authorized	Requested
5101 Regular Salaries & Wages	157112.85	172803	172803
5110 Leave Paid	9417.97	0	0
5120 Miscellaneous Earnings	37.83	0.00	0.00
5130 Overtime Paid (FLSA Exempt & Non-Exempt)	0.00	0.00	0.00
5135 Compensatory/Excess Time Used	16436.90	0	0
5140 Compensatory/Excess Time Earned (FLSA Exempt & Non-Exempt)	1437.89	0	0
5147 Personnel Services Cost Allocation	0.00	0.00	0.00
5150 Incentive Award		0.00	0.00
5160 State Retirement		31727	31727
5170 FICA/Medicare		5159	5159
5180 Health, Dental, Life & Long-Term Disability Insurance	18575.35	15741	15741
5190 Unemployment & Workers Compensation Insurance	2104.38	1555	1555
5196 Consolidated Fringe Benefits	0.00	0	0
5199 Compensatory/Excess Time Earned Benefits (FLSA Exempt)	503.83	0	0
5200 Compensatory/Excess Time Reporting Adjustments-Even Year	0.00	0	0
5300 State Leave Pool	9285.98	8986	8986
5399 Personnel Services Appropriation	0.00	0.00	0.00
Totals	263,837.81	235,971.00	235,971.00

*NOTE: There is no warning if you do not save your information before you leave this screen, remember to **SAVE your data.**

7. To input data, click on the Revenue/Expense category (ie: General Fund) and input appropriate data.
 - a. If a data box does not exist under the Revenue/Expense category you are trying to input data under you will need to add a Revenue/Object code.
 - b. If there is no box to input data into, that information was automatically downloaded as part of the personnel download.

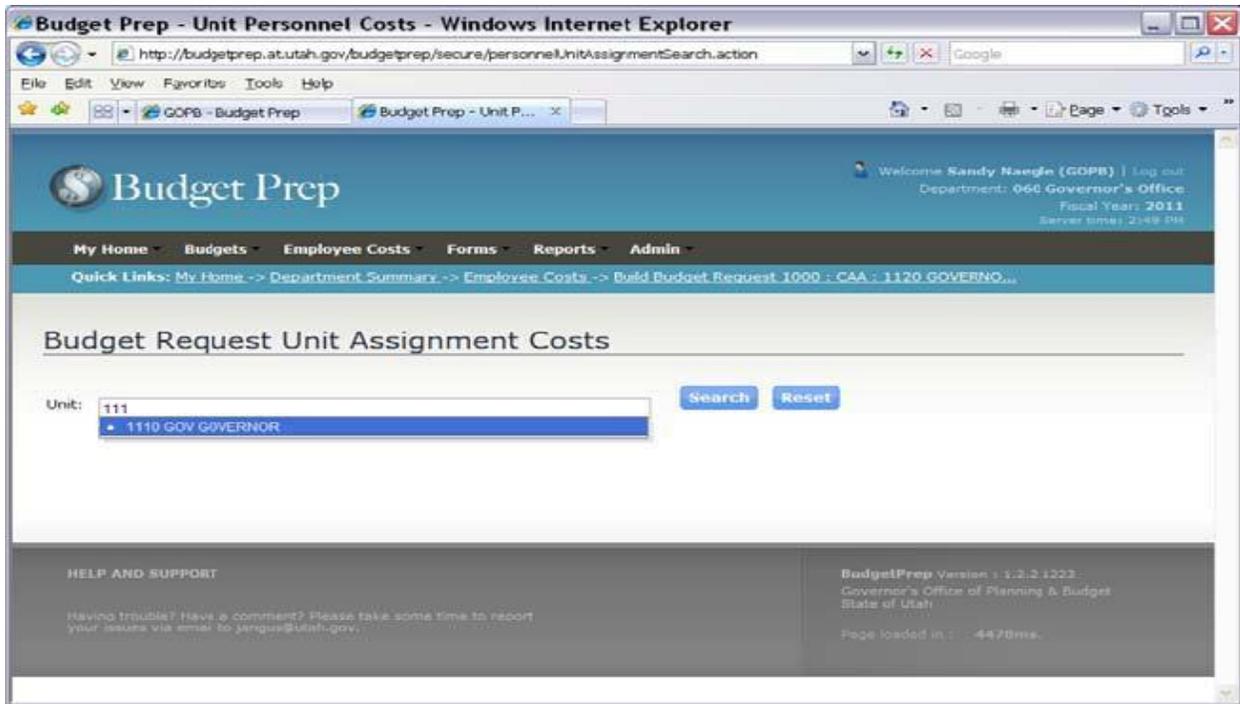
Step 5: Personnel

Adjusting Employee Costs

1. From the menu bar select **Employee Costs, Budget Request, BR-Unit Assignment Costs**

The screenshot displays the Budget Prep web application interface. At the top, there is a header with the Budget Prep logo and user information: "Welcome Jill Flygare | Log out", "Department: 060 Governor's Office", "Budget Year: 2014", and "Server time: 3:48 PM". Below the header is a navigation menu with options: "My Home", "Budgets", "Employee Costs", "Forms", "Reports", and "Admin". The "Employee Costs" menu is expanded, showing a "BUDGET REQUEST" dropdown menu with three options: "BR - Unit Assignment Costs", "BR - Search Personnel", and "BR - Add Employee". Below the menu, there is a "Unit:" input field with "Search" and "Reset" buttons. The footer contains "HELP AND SUPPORT" information and "BudgetPrep Version: 1.2.2.1454".

2. Enter the unit you want to enter personnel costs for.



3. You will see a screen that will display all of the personnel costs associated with that unit. There will be a total cost at the bottom of the page.

2000 SOA Auditing Personnel Costs

1000-EBB-2000--- Assignments

Data reflects unit assignment costs for all employees who are assigned to coding block 1000-EBB-2000---
(does not necessarily reflect costs by HOME unit)

[Jump to Build Budget 2000 SOA Auditing 1000-EBB-2000---](#) [PDF Report](#) [Post Totals](#) [Delete](#)

43 items found, displaying all items.1

	LASTNAME	FIRSTNAME	EIN	AUTH FTE	AUTH %	AUTH COST	REQ FTE	REQ %	REQ COST	Edit	Delete	Copy
<input type="checkbox"/>	Gibson	Ariane Manwaring	181041	100	100	\$72,959.22	100	100	\$72,959.22	Edit	Delete	Copy
<input type="checkbox"/>	Henderson	Melanie P	181042	100	100	\$68,613.55	100	100	\$68,613.55	Edit	Delete	Copy
<input type="checkbox"/>	Cope	Nathan Rollins	181045	100	100	\$68,156.22	100	100	\$68,156.22	Edit	Delete	Copy
<input type="checkbox"/>	Godfrey	Stanley R	110453	100	100	\$144,368.23	100	100	\$144,368.23	Edit	Delete	Copy
<input type="checkbox"/>	Ellis	Daniel Robert	181039	100	100	\$76,289.22	100	100	\$76,289.22	Edit	Delete	Copy
<input type="checkbox"/>	Ipson	Brian Lee	183994	100	100	\$70,586.28	100	100	\$70,586.28	Edit	Delete	Copy
<input type="checkbox"/>	Bowen	Steven Gary	187385	100	100	\$40,470.29	100	100	\$40,470.29	Edit	Delete	Copy
<input type="checkbox"/>	Erbstoesser	Houston Lee	187367	100	100	\$40,470.29	100	100	\$40,470.29	Edit	Delete	Copy
<input type="checkbox"/>	Thompson	Angela Janet	187365	100	100	\$40,470.29	100	100	\$40,470.29	Edit	Delete	Copy
<input type="checkbox"/>	Henderson	Bradley Clark	187369	100	100	\$40,470.29	100	100	\$40,470.29	Edit	Delete	Copy
<input type="checkbox"/>	Nelson	Patricia Renae	100601	100	100	\$124,233.37	100	100	\$124,233.37	Edit	Delete	Copy
<input type="checkbox"/>	Ross	Betsy Lynn	102004	100	100	\$167,090.85	100	100	\$167,090.85	Edit	Delete	Copy
<input type="checkbox"/>	Johnson	Lisa C	104411	100	100	\$144,861.23	100	100	\$144,861.23	Edit	Delete	Copy
<input type="checkbox"/>	Vallejos	Jenifer P	104729	100	100	\$105,419.49	100	100	\$105,419.49	Edit	Delete	Copy
<input type="checkbox"/>	Wrigley	Julie Marie	105167	100	100	\$130,428.88	100	100	\$130,428.88	Edit	Delete	Copy
<input type="checkbox"/>	Larsen	Leslie Ann	107067	100	100	\$130,428.88	100	100	\$130,428.88	Edit	Delete	Copy
<input type="checkbox"/>	Beck	Kimberlee	107256	100	100	\$90,067.86	100	100	\$90,067.86	Edit	Delete	Copy
<input type="checkbox"/>	Christensen	Joseph	111460	100	100	\$176,211.30	100	100	\$176,211.30	Edit	Delete	Copy
<input type="checkbox"/>	Siebenhaar	Linda	112188	100	100	\$97,802.99	100	100	\$97,802.99	Edit	Delete	Copy
<input type="checkbox"/>	Empey	Deborah A	112350	100	100	\$166,714.11	100	100	\$166,714.11	Edit	Delete	Copy
<input type="checkbox"/>	Hastings	Gregg F	113589	100	100	\$133,640.31	100	100	\$133,640.31	Edit	Delete	Copy

4. To make changes to individuals click **edit** next to the individual you want to change. This will take you to the Personnel Information screen.
5. If you want to remove an individual click **delete**, be careful, there is no undo.
6. You can delete multiple employees at a time – check the boxes on the left side of employees you want to **delete** and click delete. Again, there is no undo.
7. You can make changes to an individual's salary, insurance, or benefits by selecting the tabs at the top. Click **Save Employee** at the top right when completed.

Budget Prep - Personnel Info - Windows Internet Explorer

http://budgetprep.at.utah.gov/budgetprep/secure/personnelEdit.action

File Edit View Favorites Tools Help

Server time: 3:12 PM

My Home Budgets Employee Costs Forms Reports Admin

Quick Links: My Home -> Department Summary -> Employee Costs 1110 GOV GOVERNOR -> Build Budget Request 1000 : CAA : 1120 GOVERNO...

Budget Request Personnel Information

*Unit: 1110 GOV GOVERNOR Change Unit Save Employee

Pamela Blackham Bailey Jump to Personnel: Bailey, Pamela Blackham

*EIN: 120993 Title: OFFICE ADMINISTRATOR, GOVR PCN: 06011035 Jump to Build Budget

Salary Insurance Salary Driven Benefits Totals Unit & Funding Assignments

Authorized (2011)			Requested (2012)		
*Full Time Equivalent:	0	%	*Full Time Equivalent:	100	%
*Step:	0		*Step:	0	
Hours Per Year:	40		Hours Per Year:	2088	
*Rate:	60.00	\$2,400 annually	*Rate:	27.63	\$57,691.44 annually
Uniform Allowance:	0.00		Uniform Allowance:	0.00	
Firefighter's Uniform Allowance:	0.00		Firefighter's Uniform Allowance:	0.00	
Hazardous Duty Pay:	0.00		Hazardous Duty Pay:	0.00	

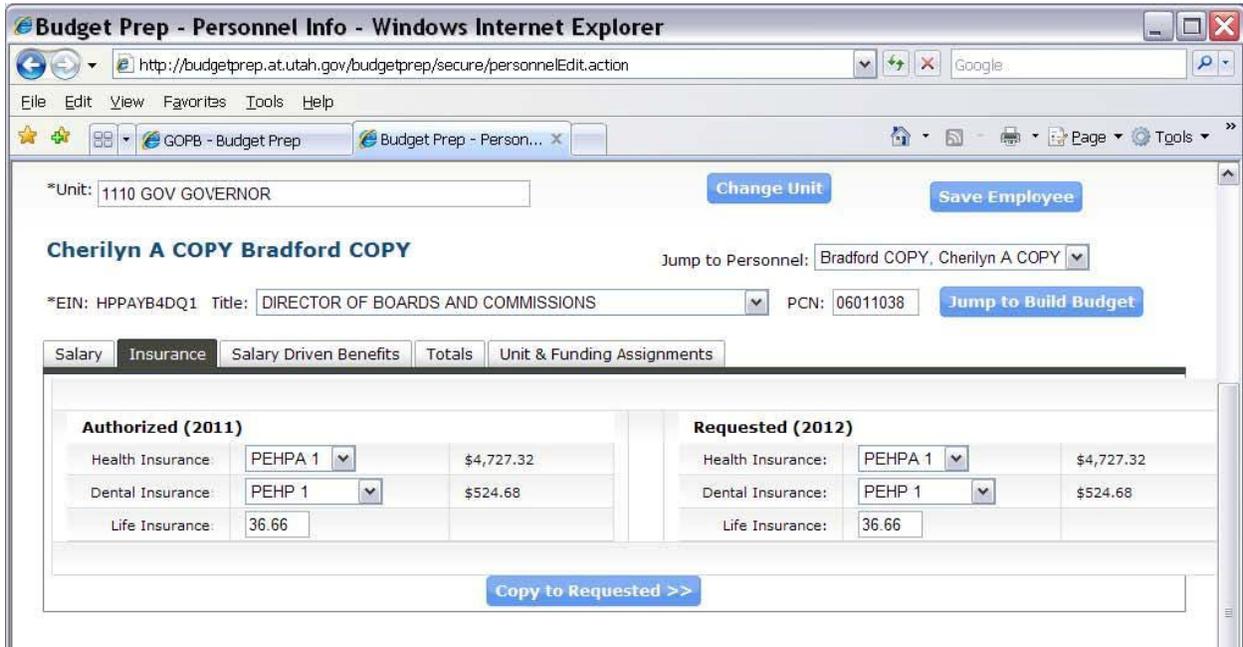
Editing Personnel Information

1. Salaries, insurance, other benefits and funding assignments can be adjusted for authorized and requested years using the personnel information screen.
2. **Salary** – Boxes to be filled in for the authorized year include:
 - a. FTE %
 - b. Step – although steps have been eliminated you can still use steps to enter rate of pay or enter the rate directly.
 - c. Hours per year – will be set at 2088
 - d. Rate
 - e. Uniform Allowance
 - f. Firefighter's Allowance
 - g. Hazardous Duty Pay
 - h. COLA – leave checked

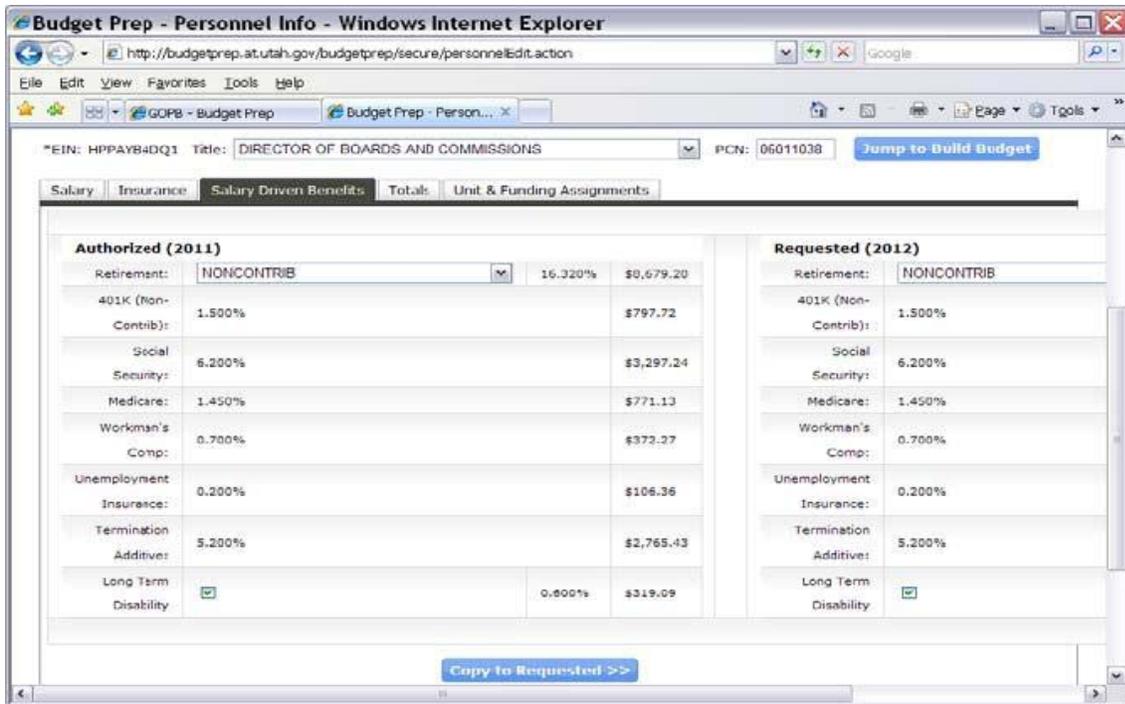
- i. Merit – leave checked (unless longevity is checked)
- j. Longevity (if checked, merit must be unchecked)

Click **Copy to Requested** or manually fill in requested year.

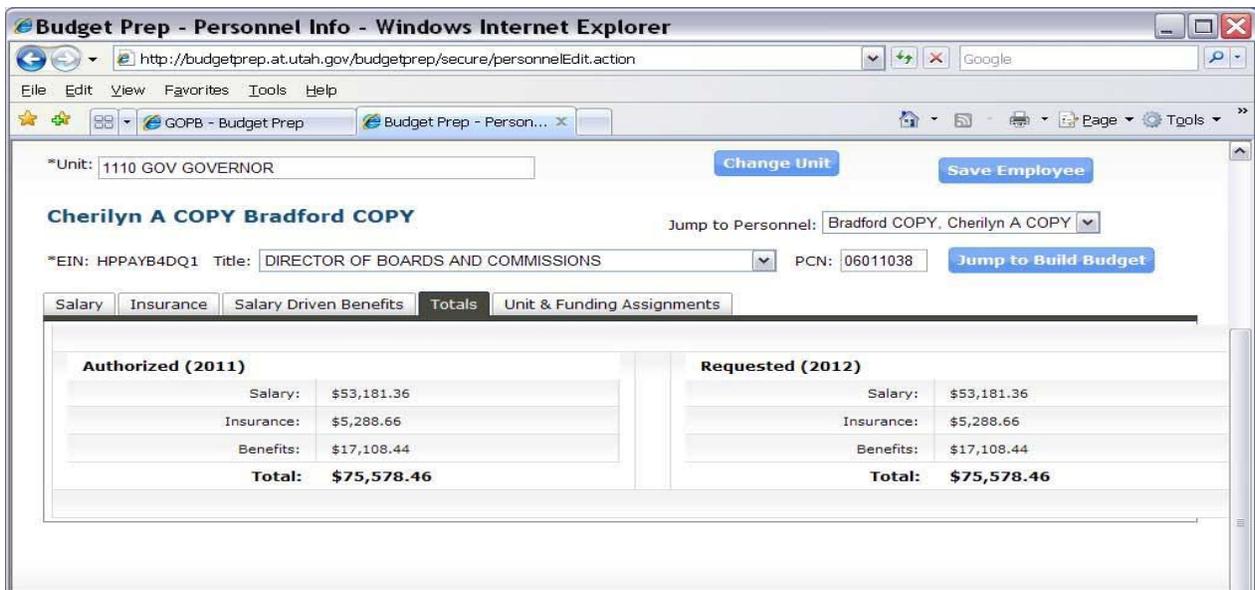
3. **Insurance** – The information for both the authorized and requested years has been downloaded for you.



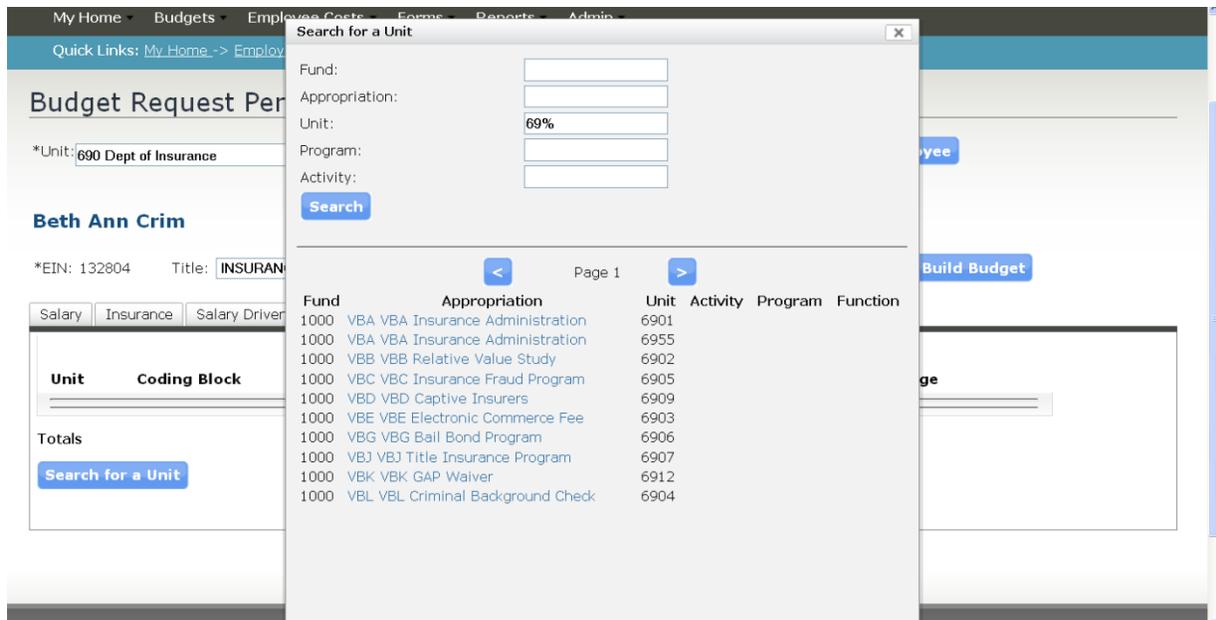
4. **Salary Driven Benefits** – The information on this screen is driven by employee-selected Retirement plans. Alternatives can be selected from the Retirement pull down menu. Remember that there are new options starting in FY 2012 (authorized). Costs are based on the rates entered by GOPB.



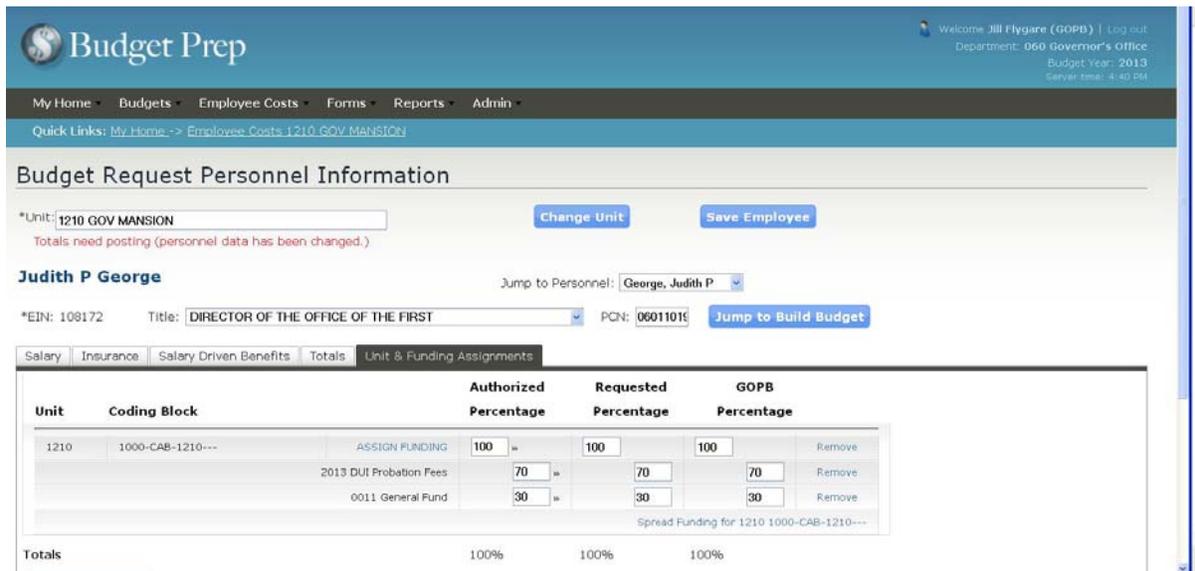
5. **Totals** - This screen adds the totals from the previous three screens (salary, insurance, salary driven benefits) for the authorized and requested years.



6. **Move employee** – If an employee downloaded to the wrong unit you can move the employees funding under the Unit & Funding Assignment .
 - a. Click **Search for a Unit**
 - b. Put the 4 digit unit number in and click search (remember % is a wildcard)
 - c. Click on the appropriate unit and assign funding to the new unit



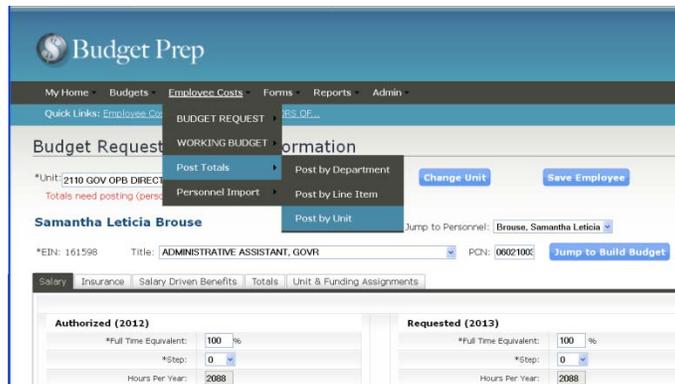
7. **Unit and Funding Assignment** – The final tab allows you to set the allocation of unit(s) assigned to each employee as well as the revenue code(s) for each employee. Remember that the total assigned funding must equal 100%.
 - a. **This step must be completed for every employee.**
 - b. Funding can be copied from one employee in a unit to another.
 - i. Assign funding for one employee in the unit
 - ii. Save the employee
 - iii. Click spread unit funding – this will assign the same funding to all employees within that unit



8. Click **Save Employee**
9. Once you save changes to personnel a notice will appear in red Totals need posting. Only do this for one unit at a time.



10. To post totals:
 - a. From menu bar select **Employee Costs, Post Total, Post by Unit**



- b. Uncheck all, only check the unit you were working on. Click Request Post Totals
- c. You will then wait for a confirmation email that your request was completed. This may take a few minutes or could take several hours depending on the size of the job and how many other jobs are in the queue. Be patient. **DO NOT** keep posting, this will only delay yours and other responses.
- d. Only a Department Administrator can post by line item or department. Remember; once you post totals you override everything so be very careful about what you are doing.

Use this screen to request a posting totals of the personnel data.

This process should be run whenever personnel, organization, or coding block deletions have been performed. This is a critical step in insuring that the roll-up values are accurate for an organization. Additionally, because of the dependencies between personnel and state wide costs, this process should also be performed any time step rates, hours per year, or benefit rates are changed.

Ideally all changes to these items will be made prior to requesting this aggregation process. This approach to agency and/or system wide changes has the least amount of impact on the application and is the "shortest path" in terms of processing time/effort.

This post totals update process does not happen immediately due to the vast amount of data that needs to be processed.

To best manage application resources for the budget prep system, a background job will be queued to run to process the data.

We'll send you an email once the post totals has finished. Until you receive this email, the assumption must be made that the processing is on-going and all personnel related costs continue to reflect system values prior to any changes that were made.

Post totals currently applicable for Budget Request

Select UNITS for post totals for 060 Governor's Office

[Check/Uncheck All](#)

- 1110 GOV GOVERNOR
- 1120 GOVERNOR'S WELLNESS & PREPAREDNESS
- 1130 GOVERNOR'S TRANSITION
- 1210 GOV MANSION
- 1310 GOV WASHINGTON OFFICE
- 1410 GOV LITERACY COMMISSION
- 1410 GOV LITERACY COMMISSION
- 1420 GOV PROJECT 1420
- 1430 GOV SECURITY
- 1440 GOV PROJECT 40
- 1450 GOV PROJECT 50
- 1460 GOV PROJECT 60
- 1470 GOV PROJECT 70
- 1480 GOV PROJECT 80

Search for a Person

1. Once you have inputted your personnel data you may need to make changes to a few individual employees. You can search for individuals through the search function.
2. From the menu bar select **Employee Costs, Budget Request, BR-Search Personnel**
3. You can search for an individual by *last name, first name*, employee number, or employee PCN*. The more information you provide the narrower your search will be. * First name is the best search to begin with.
4. A list of employees that meet your search criteria will be returned, find the person you want to make changes to and select **edit** next to their name. You will be sent to the Personnel Information screen described above.

Search Personnel

Last Name:

First Name:

Employee Number:

Employee PCN:

Employee List

128 items found, displaying 1 to 20. [First/Prev] 1, 2, 3, 4, 5, 6, 7 [Next/Last]

Lastname ↑	Firstname	Employee Number	PCN	Action
Person	Any	000000	ZZZZZ	Edit
Body	Some	111111	BBBBB	Edit
Body	No	222222	CCCCC	Edit

Adding Employees

1. From the menu bar select **Employee Costs, Budget Request, BR-Add Employee**
2. Fill in the following boxes:
 - a. Unit – every employee needs to be assigned to a unit. You can spread their funding among several units but they need have a home unit assignment

- b. First Name
 - c. Last Name
 - d. Title – choose from the drop down menu
 - e. DPR
 - f. Salary – fill in FTE %, rate, uniform allowance if applicable (copy to requested year)
 - g. Insurance – Health, Dental, Life (copy to requested year)
 - h. Salary Driven Benefits – Retirement option chosen by employee (copy to requested)
 - i. Unit & Funding Assignment – assign funding for employee (must equal 100%)
3. Select **Save Employee**
 4. NOTE: It is often easier to copy an old employee and make changes to their information than to add a new employee.

Step 6: Forms

Copy from Previous Years

Most of you have done this before. There is no reason to re-invent your forms each year. Unless something has changed, most forms can simply be copied over each year. To do that:

1. From the menu bar select **Forms, Budget Forms**

 Welcome Jill Flygare (GOPB) | Log out
 Department: 060 Governor's Office
 Budget Year: 2013
 Server time: 11:12 AM

My Home - Budgets - Employee Costs - **Forms** - Reports - Admin

Quick Links: My Home -> Employee Costs 2110 -> Budget Forms -> CF...

News and Notices

- Form 150
- Form 151

User Account Information

The following user account information is what we have listed for your account. If corrections need to be made, please contact the system administrator.

Email Address: jflygare@utah.gov
 Current Department: 060 Governor's Office
 Other Assignments

Welcome to Budget Prep Test

You are working in test mode.

Jobs you have queued for processing

 Welcome Jill Flygare (GOPB) | Log out
 Department: 060 Governor's Office
 Budget Year: 2013
 Server time: 3:10 PM

My Home - Budgets - Employee Costs - **Forms** - Reports - Admin

Quick Links: My Home -> Department Summary -> Employee Costs 2110 GOV OPB DIRECTORS OF... -> Build Budget Request 1000 : CBB : 2110 GOV OPB...

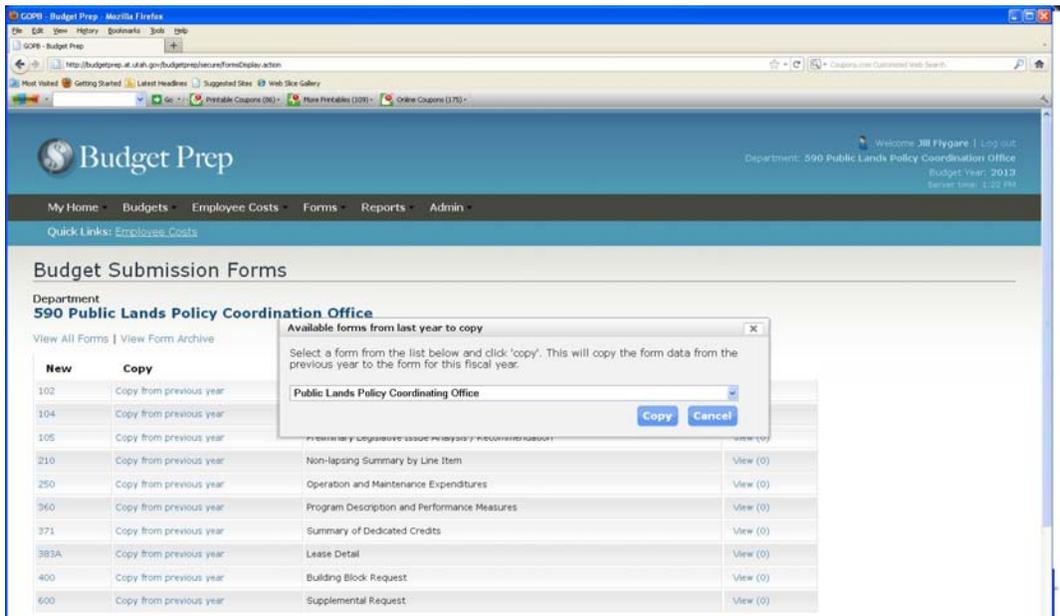
Budget Submission Forms

Department
060 Governor's Office

[View All Forms](#) | [View Form Archive](#)

New	Copy	Description	View
102	Copy from previous year	Summary of Cost Drivers	View (0)
104	Copy from previous year	Legislative Intent Statements	View (0)
105	Copy from previous year	Preliminary Legislative Issue Analysis / Recommendation	View (0)
210	Copy from previous year	Non-lapsing Summary by Line Item	View (0)
250	Copy from previous year	Operation and Maintenance Expenditures	View (0)
360	Copy from previous year	Program Description and Performance Measures	View (0)
371	Copy from previous year	Summary of Dedicated Credits	View (0)
383A	Copy from previous year	Lease Detail	View (0)
400	Copy from previous year	Building Block Request	View (0)
600	Copy from previous year	Supplemental Request	View (0)

- From the Budget Form screen select **Copy from previous year**, select the form you want to copy, click copy.



- If you have multiple forms you will need to do this for each form.

Creating New Forms

- From the menu bar select **Forms, Budget Forms**
- Select the form you want to create by clicking the corresponding form number under the **New** column on the left (see the Budget Form screen above).

Viewing Forms

- From the menu bar select **Forms, Budget Forms**
- You can view forms by clicking the far right column **View(#)**.
- A list of all forms of this type will be generated.
- Once you create this list you can do the following things:
 - Edit the forms
 - Print the forms
 - Delete the forms
 - Submit the forms

GOPB - Budget Prep - Windows Internet Explorer

http://budgetprep.at.utah.gov/budgetprep/secure/forms/formsDisplayFormsView.action?orgSelected=

File Edit View Favorites Tools Help

GOBP - Budget Prep

Budget Submission Forms

Department
060 Governor's Office

List of Forms of Type 102

	Form No.	Description	Status	
Edit Print	102	060 Governor's Office	PENDING	Delete
Edit Print	102	skjflkadjf	SUBMITTED	Delete
Edit Print	102	060 Governor's Office	PENDING	Delete
Edit Print	102	Governor's Office	PENDING	Delete
Edit Print	102	gov	SUBMITTED	Delete
Edit Print	102	Testing ABC	PENDING	Delete

[Submit All Pending Reports](#)

HELP AND SUPPORT

BudgetPrep Version : 1.2.2.1223
Governor's Office of Planning & Budget
State of Utah

Step 7: Reports

There are several different types of reports that Budget Prep allows you to prepare to help both you and GOPB in the budget process.

Budget Prep

Welcome: Jill Flynn | Log out
Department: 690 Utah State Auditor | Budget Year: 2015
Server Time: 2:05 PM

My Home | Budgets | Employee Costs | Forms | Reports | Admin

Quick Links: My Home | Employee Costs | 2000 SOA Auditing

Budget Request Unit Assignment

Unit: 2000 SOA Auditing [Search](#) [Reset](#)

2000 SOA Auditing Personnel Costs

1000-EBB-2000 -- Assignments

Data reflects unit assignment costs for all employees who are assigned to coding block 1000-EBB-2000---
(does not necessarily reflect costs by HOME unit)

[Jump to Build Budget 2000 SOA Auditing 1000-EBB-2000---](#)

43 items found, displaying all items.

	LASTNAME	FIRSTNAME	EIN	AUTH FTE	AUTH %	AUTH COST	REQ FTE	REQ %	REQ COST	Edit	Delete	Copy
<input type="checkbox"/>	Gibson	Ariane Manwaring	181041	100	100	\$72,959.22	100	100	\$72,959.22	Edit	Delete	Copy
<input type="checkbox"/>	Henderson	Melanie P	181042	100	100	\$68,613.55	100	100	\$68,613.55	Edit	Delete	Copy
<input type="checkbox"/>	Cope	Nathan Rollins	181045	100	100	\$68,156.22	100	100	\$68,156.22	Edit	Delete	Copy
<input type="checkbox"/>	Godfrey	Stanley R	110453	100	100	\$144,368.23	100	100	\$144,368.23	Edit	Delete	Copy
<input type="checkbox"/>	Ellis	Daniel Robert	181039	100	100	\$76,289.22	100	100	\$76,289.22	Edit	Delete	Copy
<input type="checkbox"/>	Ipson	Brian Lee	183994	100	100	\$70,586.28	100	100	\$70,586.28	Edit	Delete	Copy
<input type="checkbox"/>	Bowen	Steven Gary	187385	100	100	\$40,470.29	100	100	\$40,470.29	Edit	Delete	Copy
<input type="checkbox"/>	Erbatsoesser	Houston Lea	187367	100	100	\$40,470.29	100	100	\$40,470.29	Edit	Delete	Copy
<input type="checkbox"/>	Thompson	Angela Janet	187365	100	100	\$40,470.29	100	100	\$40,470.29	Edit	Delete	Copy
<input type="checkbox"/>	Henderson	Bradley Clark	187369	100	100	\$40,470.29	100	100	\$40,470.29	Edit	Delete	Copy
<input type="checkbox"/>				100	100	\$124,233.37	100	100	\$124,233.37	Edit	Delete	Copy

PDF Report Post Totals Delete

http://budgetprep.at.utah.gov/budgetprep/secure/personnel/indAssignmentSearch.action?l

Summary Reports

1. From the menu bar select **Reports, Summary Reports**
2. Select the type of report you want from the drop down menu.
3. Select the level you want to view your report (department, line item, appropriation code, unit).
4. Select the entities you want to view (one, all, or a few).
5. Generate PDF (you no longer have the option to view excel reports).

The screenshot shows a web application interface for generating summary reports. At the top, there is a navigation menu with items: My Home, Budgets, Employee Costs, Forms, Reports, and Admin. Below the menu is a quick link for My Home. The main heading is "Summary Reports - Step 3: Select Organization Entities". The interface is titled "590 Public Lands Policy Coordination Office". It is divided into three sections: 1. Report Type & Year, where the Report Type is set to "Value Difference Category Report (Summary)" and the Year is "2013"; 2. Organization Level, where the level is set to "Appropriation Code"; and 3. Organization Entities, which lists "Appropriation Codes" with two items: "RXA Public Lands Policy Coordination Office" (checked) and "ZAE Comp & Excess Pool" (unchecked). There are "Select All" and "Deselect All" buttons above the list. A "Generate PDF Report" button is located at the bottom left of the form area.

Detailed Reports

1. From the menu bar select **Reports, Detailed Reports**
2. Select the type of report you want from the drop down menu.
3. Select the level you want to view your report (department, line item, appropriation code, unit).
4. Select the entities you want to view (one, all, or a few).
5. Generate PDF (you no longer have the option to view excel reports).

Appendix 1: Contact Information

Questions?

For questions and concerns regarding Budget Prep please contact your GOPB Analyst. If necessary, your analyst will contact the appropriate people within our office to help resolve your concerns. **Do not contact Sandy Naegle or DTS directly.** GOPB will charge departments for any additional programming costs that may be incurred as a result of agencies going directly to the programmers. Please follow the appropriate protocol and allow your analysts to help you solve your problems.

GOPB Analysts

Samantha Brouse: Capitol Preservation Board Legislature	Samantha@utah.gov	801-538-1555
Kamron Dalton Human Services Workforce Services	kdalton@utah.gov	801-538-1556
Jill Flygare Agriculture and Food Environmental Quality Public Lands Policy Coordinating Office Natural Resources Trust Lands Administration Utah State Fair Corporation Federal Funds	jflygare@utah.gov	801-538-1573
Nancy Grisel Alcoholic Beverage Control Commerce GOED Financial Institutions Public Service Commission National Guard Veterans' Affairs	ngrisel@utah.gov	801-538-1543
Jim Grover Board of Regents Higher Education Medical Education Council Utah College of Applied Technology Utah Education Network	jgrover@utah.gov	801-538-1839
Lynn Hansen Administrative Services	lynnhansen@utah.gov	801-538-1703

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