

SALARY AND POSITION PLANNING



APPLICATION BRIEF
ON THE IBM COGNOS
PERFORMANCE BLUEPRINT

A WEB-BASED PERFORMANCE MANAGEMENT
APPLICATION

INTRODUCTION

This application brief demonstrates a web-based planning and reporting process for forecasting university faculty position and compensation requirements using IBM Cognos 8 Planning and IBM Cognos 8 Business Intelligence.

For most universities and colleges, planning for faculty and the associated funding is critical to achieving and maintaining academic standards. The two goals are inseparable, as the university must be able to recruit and retain qualified staff in order to attract public and private funding. The IBM Cognos Salary and Position Planning Performance Blueprint provides a streamlined, best-practice planning, forecasting, analysis, and reporting tool for academic salary and position planning that includes allocation of funding to compensate staff for salaries, benefits, and any associated expense.

Cognos IBM Performance Blueprints are pre-defined data, process, and policy software models developed in partnership with leading academic institutions. They are essentially “quick-start” data models that Cognos customers can download and implement at no extra cost.

Using the blueprint with your Cognos performance management system will enable users to clearly identify goals and track against them in a consistent, logical manner. This tool gives the user a simple yet powerful way to plan for academic institutional growth and success.

OVERVIEW

Most planning for academic positions is carried out today by one person at the individual departmental or class level. This can limit the ability to effectively plan inter-faculty or interdepartmental faculty requirements and associated funding. It does not allow for even the most basic information needs, and is frequently based on manual, error-prone, and widely scattered spreadsheets that may be at odds with each other. In this situation faculty may be over- or under-utilized. Unnecessary or overlapping position requirements may be planned. Equally important, the allocation of funding to pay for these positions may be incorrect and inconsistent between departments and faculty.

In a climate of slower enrollment and competition for top research and funding, universities must be able to define effective long-term growth plans, manage to these plans, analyze trends and scenarios, and plan for future excellence. Being able to successfully plan for academic staffing allows these institutions to focus on:

- Retaining existing high quality academic staff
- Attract new faculty
- Track staffing needs across and between all colleges
- Attract private sources of funding
- Ensure that government funding and regulations are in compliance
- Ensure that course requirements can be filled
- Meet research goals

BLUEPRINT OBJECTIVES

The IBM Cognos Salary and Position Planning Performance Blueprint, together with your Cognos performance management software, provides a reliable, consistent modeling tool that lets you analyze current and projected staffing and funding requirements. Even more beneficial, this blueprint can be used in conjunction with the existing IBM Cognos Enrollment and Tuition Planning Blueprint as a driver for position planning. This blueprint will enhance your ability to:

- Forecast new positions needed to meet college/faculty course requirements
- Track faculty tenure and positions to ensure these are in line with current teaching and research needs
- Allocate staff among departments and across colleges
- Plan for future positions
- Plan and allocate funding by amount, type, and date
- Track funding and salary requirements throughout the year to ensure there is sufficient funding or that all funding is being used
- Validate that funding allocations across the university and among the faculties are consistent
- Identify any shortfalls in funding

This application brief describes models and processes that meet the needs of most universities and colleges. As in all the blueprints, this model can easily be configured to support alternative and specific requirements to accommodate planning in any institution.

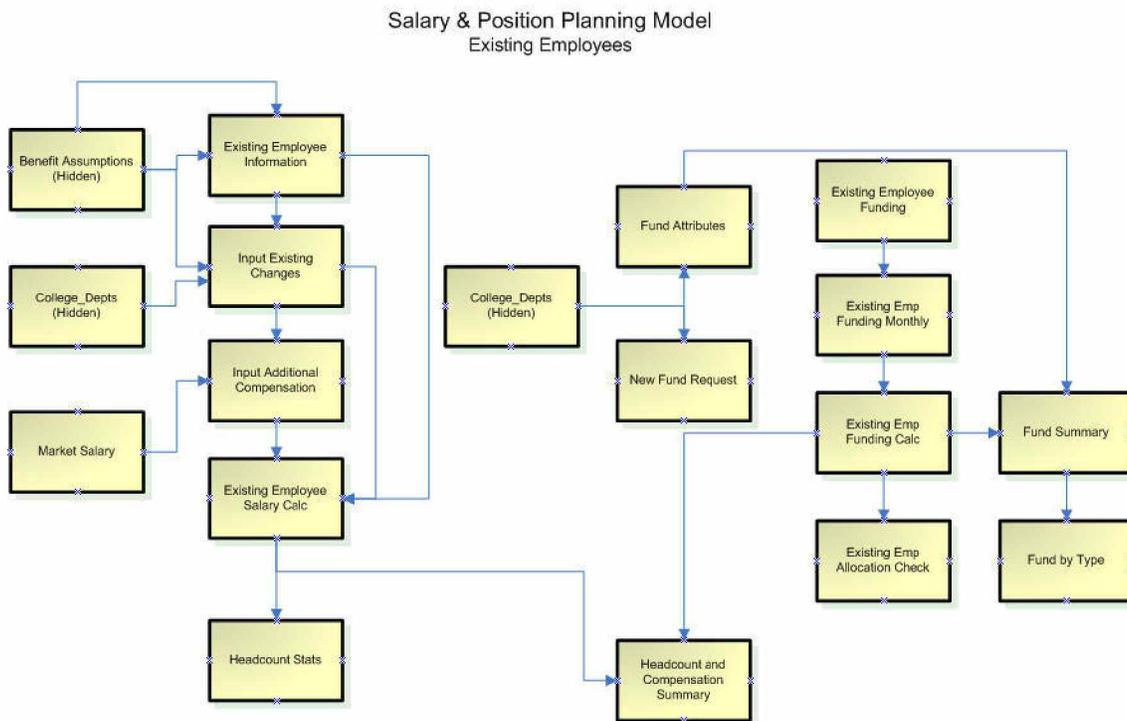
KEY COGNOS PLANNING BENEFITS

IBM Cognos 8 Planning, which is part of the Cognos performance management system, benefits organizations through its best-practice planning capabilities:

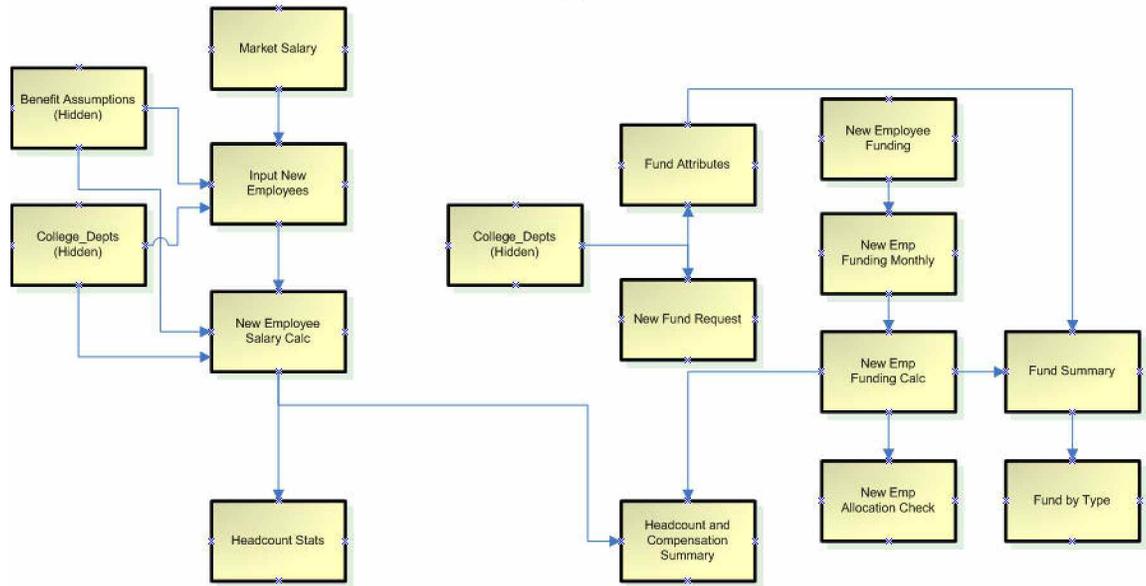
- Flexible model development to support a wide variety of planning models
- Web-based or Excel-based deployment of models for data collection and consolidation
- Easy version control
- Real-time workflow that drives collaboration
- Real-time consolidation
- Real-time reporting
- Real-time calculations in the browser for immediate results
- Audit and user textual annotations at the cell, worksheet, and model level to drive collaboration
- Drop-down validation lists for ensuring data consistency
- Scalable architecture with proven deployments to thousands of users
- Linking functionality to bridge divergent yet interrelated components of the planning environment
- Off-line capabilities
- Custom date capabilities with no limit on the time dimension, allowing planning by the week, season, period, quarter, or year
- Unique multi-directional calculation engine that allows input across any dimension at the detail or aggregate level.

MODEL DESIGN

The following flowchart provides a high-level overview of the salary and position planning process for existing and new positions.



Salary & Position Planning Model New Employees



SALARY AND POSITION PLANNING DASHBOARD

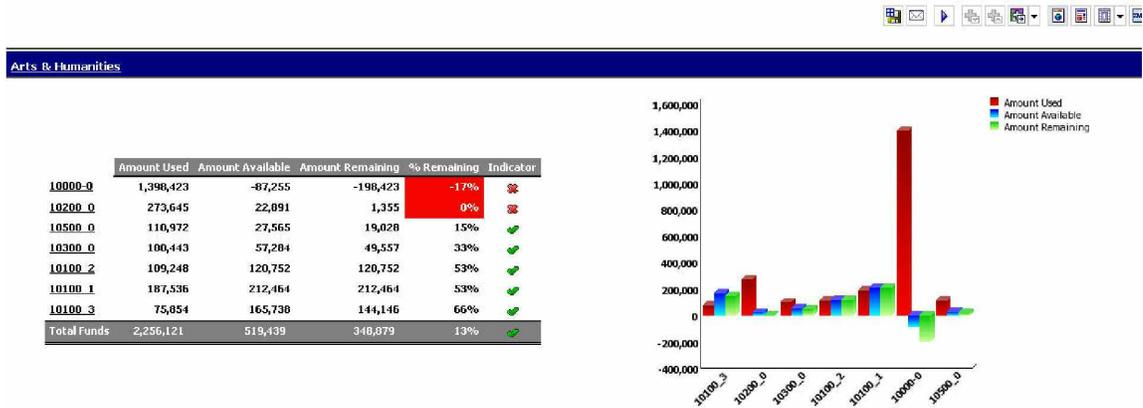
A typical planning process may begin with the Dean of Arts and Humanities opening the salary and position planning portal as shown below. This dashboard contains graphics related to funding available and highlights any funding that requires attention due to over- or under-allocation. In the example below we can see that we are in a red alert situation for Fund 10000-0. We also see that one of our employees is overfunded.



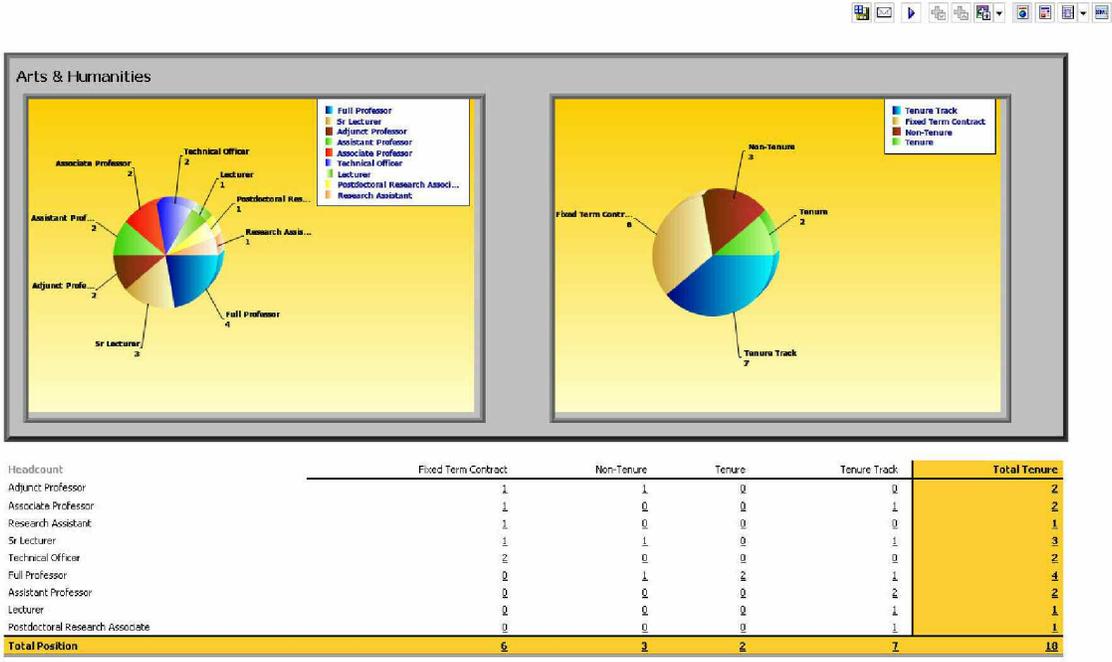
We may want to drill down on this fund to see how it is distributed throughout the academic year.

Fund Account: 10000-0													
Employee Comp	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total Months
ALLAN BARKER	\$0,305	\$12,577	\$0,305	\$0,305	\$0,305	\$0,305	\$0,305	\$12,577	\$0,305	\$0,305	\$0,305	\$0,305	\$109,004
CUNNINGHAM, LARA M	\$6,202	\$12,017	\$6,202	\$6,202	\$6,859	\$6,859	\$6,859	\$12,705	\$6,202	\$6,202	\$6,202	\$6,202	\$108,713
ELTON JOHNSON	\$11,308	\$16,962	\$11,308	\$11,308	\$11,308	\$11,308	\$11,308	\$16,962	\$11,308	\$11,308	\$11,308	\$11,308	\$147,004
FLETCHER, JENNIFER G	\$6,158	\$14,169	\$10,158	\$10,158	\$8,077	\$8,077	\$8,077	\$12,115	\$8,077	\$8,077	\$8,077	\$8,158	\$111,378
GLUPPY, ROSE MARIE	\$7,963	\$11,879	\$7,963	\$7,963	\$7,885	\$7,885	\$7,885	\$11,827	\$7,885	\$7,885	\$7,885	\$7,963	\$102,868
JOHNSON, MARIE	\$3,491	\$5,207	\$3,491	\$3,491	\$3,456	\$3,456	\$3,456	\$5,184	\$3,456	\$3,456	\$3,456	\$3,491	\$45,091
MAJZEL, JOAN E	\$6,992	\$10,431	\$6,992	\$6,992	\$6,923	\$6,923	\$6,923	\$10,385	\$6,923	\$6,923	\$6,923	\$6,992	\$90,322
MALENSKY, NANCY	\$5,868	\$8,753	\$5,868	\$5,868	\$5,810	\$5,810	\$5,810	\$8,714	\$5,810	\$5,810	\$5,810	\$5,868	\$75,799
MARY SMITH	\$9,015	\$13,523	\$9,015	\$9,015	\$9,515	\$9,515	\$9,515	\$14,023	\$9,515	\$9,015	\$9,015	\$9,015	\$119,696
MCCRARY, SUSAN B	\$10,877	\$16,226	\$10,877	\$10,877	\$10,769	\$10,769	\$10,769	\$16,154	\$10,769	\$10,769	\$10,769	\$10,877	\$140,502
MCQUERN-WEBB, MARLYN J	\$8,585	\$12,807	\$8,585	\$8,585	\$8,500	\$8,500	\$8,500	\$12,750	\$8,500	\$8,500	\$8,500	\$8,585	\$110,897
MIZEUR, EVA	\$10,100	\$15,067	\$10,100	\$10,100	\$10,000	\$10,000	\$10,000	\$15,000	\$10,000	\$10,000	\$10,000	\$10,100	\$130,467
NANCY NOLAN	\$5,973	\$8,960	\$5,973	\$5,973	\$5,973	\$5,973	\$5,973	\$8,960	\$5,973	\$5,973	\$5,973	\$5,973	\$77,650
NORRIS GILBERT	\$7,179	\$10,456	\$7,179	\$6,554	\$6,554	\$6,554	\$6,554	\$9,831	\$6,554	\$6,554	\$6,554	\$7,179	\$87,702
OLIVIA NEWTON	\$6,127	\$9,190	\$6,127	\$6,127	\$6,127	\$6,127	\$6,127	\$9,190	\$6,127	\$6,127	\$6,127	\$6,127	\$79,650
PACKENHAM, NANCY J	\$7,769	\$11,590	\$7,769	\$7,769	\$7,692	\$7,692	\$7,692	\$11,538	\$7,692	\$7,692	\$7,692	\$7,769	\$100,356
RAYMOND BLAIR	\$6,785	\$10,177	\$6,785	\$6,785	\$6,785	\$6,785	\$10,177	\$6,785	\$6,785	\$6,785	\$6,785	\$6,785	\$88,204
WILLIAM WARING	\$7,369	\$11,054	\$7,369	\$7,369	\$7,369	\$7,369	\$7,369	\$11,054	\$7,369	\$7,369	\$7,369	\$7,369	\$95,798
Total Employees	\$140,146	\$211,045	\$142,146	\$141,521	\$139,987	\$139,987	\$139,987	\$209,146	\$139,330	\$138,830	\$138,830	\$140,146	\$1,821,101

We can also look at a heat map of funding information for more detail.



Understanding the distribution of faculty with respect to tenure, non-tenure, and contractual positions within the Arts and Humanities college, as shown below, will allow more accurate planning.



REPRESENTATIVE WORKFLOW

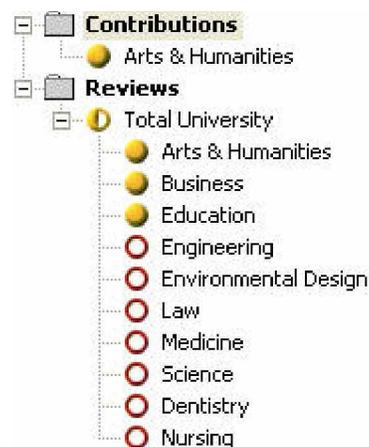
The IBM Cognos Salary and Position Planning Performance Blueprint lets faculty-level contributors forecast salary and positions using the IBM Cognos 8 Planning tool. The following describes a basic workflow in which a faculty-level contributor would:

- Review existing employee information
- Input changes and plan additional compensation for existing employees
- Input new position requirements and compensation
- Plan staff allocation to internal departments and/or other colleges and departments
- Review total salary and benefit expense for the college
- Determine funding attributes for existing funds
- Determine new funding anticipated
- Allocate funding to existing and new staff
- Reconcile faculty and funding

This blueprint contains 20 tabs, which are identical for every faculty in the elist. This blueprint was based on the existing IBM Cognos Workforce Planning Performance Blueprint, and expanded and refined to meet higher education requirements. One of these specifics is that funding for faculty is critical in the university staffing process.

The elist or hierarchy below shows a number of typical faculties aggregating to the institutional level. This elist might be expanded to a multi-level hierarchy including departments aggregating to faculties.

ELIST



ACCESS RIGHTS

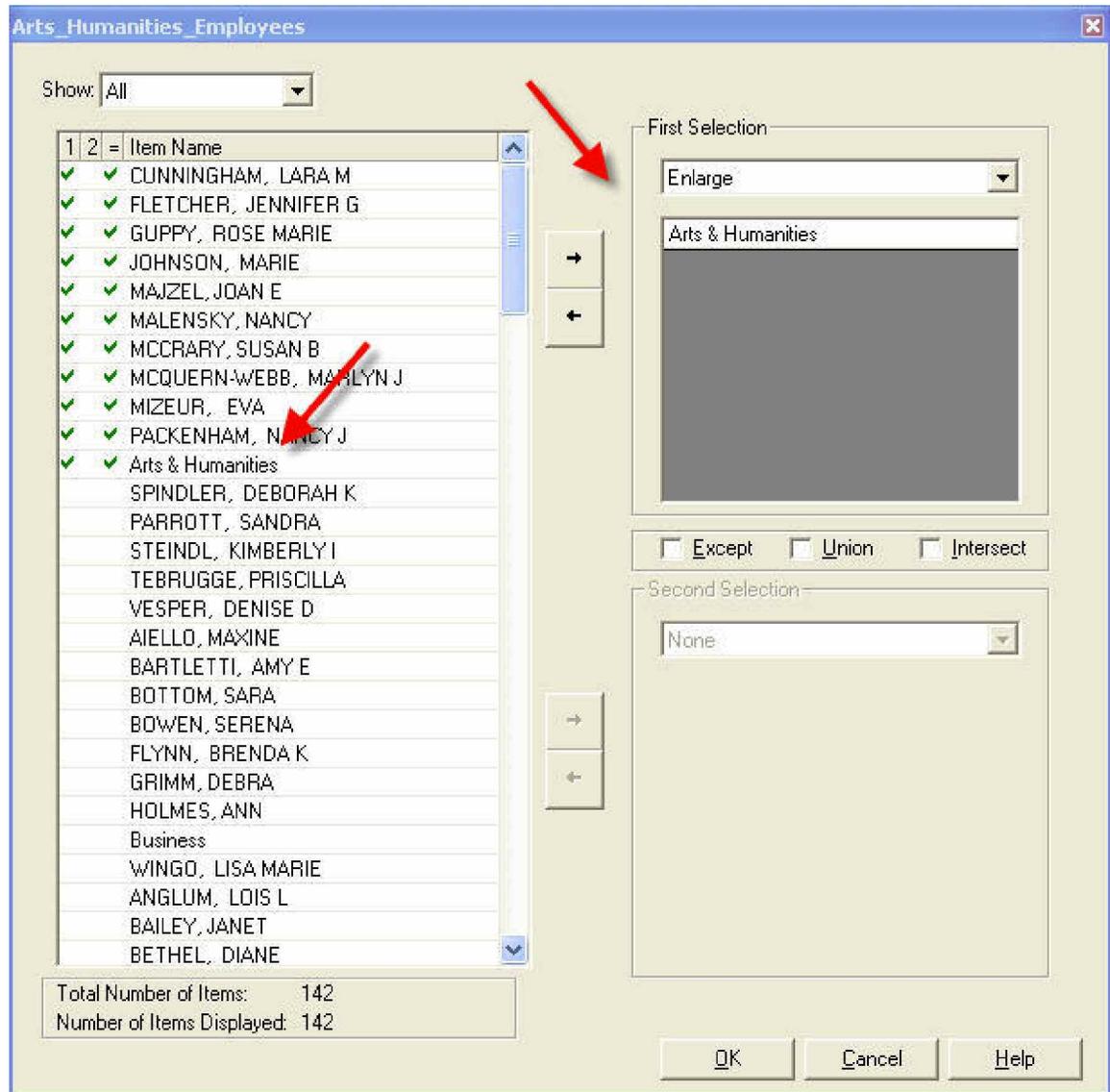
All users have the same views and inputs, but each faculty will view only its own employee information and be able to determine only its own future staffing requirements. While faculties will be able to allocate their college funds, they may also indicate when other college funds will be used to fund their staff. If needed, faculties may be able to plan for other college funds, the details of which would appear in the fund list. Then the other colleges would be able to review their fund usage.

Since much of this information is highly confidential, it is important to ensure access rights are properly defined. These rights are typically created by saved selections on the existing employee list. In our example this dimension shows all employees and their respective departmental subtotals.



	Item name	Format	Calculation	Calc. Option
1	BUNNINGHAM, JARA M			
2	FLETCHER, JENNIFER G			
3	GUPPY, ROSE MARIE			
4	JOHNSON, MARIE			
5	MAIZEL, JOAN E			
6	MALENSKY, NANCY			
7	MCCRARY, SUSAN B			
8	MCQUERN-WEBB, MARLYN J			
9	MIZEUP, EVA			
10	PACKENHAM, NANCY J			
11	Arts & Humanities		Subtotal	
12	SPINDLER, DEBORAH K			
13	PARROTT, SANDRA			
14	STEINDL, KIMBERLY I			
15	TEBRUGGE, PRISCILLA			
16	VESPER, DENISE D			
17	AIELLO, MAXINE			
18	BARTLETTI, AMY E			
19	BOTTOM, SARA			
20	BOWEN, SERENA			
21	FLYNN, BRENDA K			
22	GRIMM, DEBRA			
23	HOLMES, ANN			
24	Business		Subtotal	

By creating a saved selection for the Arts and Humanities subtotal, all future Arts and Humanities faculty will automatically be included in this saved selection.



EXISTING EMPLOYEES

This tab represents existing employee data. Universities and colleges will most likely import this information from the existing human resources system. Note that faculty members' responsibilities can be allocated to various departments within the faculty or to other faculty departments. Employees typically belong to a primary or "home" department. When you select a new department, the corresponding college is automatically updated.

In this example we see some warning messages displayed. Warnings appear if a percentage allocation is input without a corresponding department, or if the individual's time is over or under 100 percent. Other information in this tab includes position title, tenure status, and salary and health benefits. You can easily expand or modify the data in this cube to more closely match institutional requirements. While the information below is open for write access, this tab would typically display as a "read only" tab with the data imported from the institution's HR system.

Existing Employee Information	Input - Existing Changes	Input - Additional Compensation	Existing Employee Salary Calc	Input - New Headcount	New Employee Salary Calc
Arts & Humanities					
Employee #	CUNNINGHAM, LARA M 36700	FLETCHER, JENNIFER G 57800	GUPPY, ROSE MARIE 54600	JOHNSON, MARIE 50015	MAJZEL, JOAN E 40130
Salary	100,000.00	105,000.00	102,500.00	106,500.00	90,000.00
Position	Associate Professor	Full Professor	Associate Professor	Full Professor	Adjunct Professor
Current Status	Active	Active	Active	Active	Active
FTE%	100.00%	100.00%	100.00%	75.00%	100.00%
Primary College	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities
Primary Dept	1002	1004	1003	1001	1002
Primary Department Name	History	Humanities	Art History	English Literature	History
Research Group	Civil War Historical Society				
Primary Dept%	50.00%	30.00%	20.00%	25.00%	100.00%
2nd Dept	1004	5001	4002	4001	
2nd Dept Name	Humanities	Mechanical Engineering	Secondary Education	Elementary Education	
2nd College	Arts & Humanities	Engineering	Education	Education	
2nd Dept%	50.00%	70.00%	0.00%	70.00%	0.00%
3rd Dept					
3rd Dept Name					
3rd College					
3rd Dept%	0.00%	0.00%	0.00%	0.00%	0.00%
Warning Department			Input a % for Department	Allocation must equal 100%	
Tenure Status	Tenure Track	Tenure	Fixed Term Contract	Non-Tenure	Non-Tenure
Contract Start Date					
Contract End Date					
Warning Tenure Status			Selection REQUIRES Start AND End Dates		
Campus	Minneapolis, MN	Minneapolis, MN	Minneapolis, MN	Minneapolis, MN	Minneapolis, MN
Health Plan	Individual + 1	Family Plan	Individual Plan	Individual Plan	Individual + 1
Dependents Eligible	0	0	1	0	0

INPUT - EXISTING CHANGES

The next tab lets you input any changes to existing employee information. These changes may include employment status changes, a change in position, or even a departmental transfer.

	CUNNINGHAM, LARA M	FLETCHER, JENNIFER G	GUPPY, ROSE MARIE	JOHNSON, MARIE	MAJZEL, JOAN E	MALENSKY, NANCY	MCCRARY, SUSAN B	DOUERN-WEBB, MARLY
Position	Associate Professor	Full Professor	Associate Professor	Full Professor	Adjunct Professor	Sr Lecturer	Full Professor	Assistant I
Current Status	Active	Active	Active	Active	Active	Active	Active	
New Position	Full Professor							
Position this Year	Full Professor	Full Professor	Associate Professor	Full Professor	Adjunct Professor	Sr Lecturer	Full Professor	Assistant Pr
Primary Dept	1002	1004	1003	1001	1002	1003	1005	
FTE%	100.00%	100.00%	100.00%	75.00%	100.00%	100.00%	100.00%	
FT/PT	FT	FT	FT	PT	FT	FT	FT	
Recommended Merit %	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%	
Merit Month	Apr	Apr	Apr	Apr	Apr	Apr	Apr	
Action	Change Merit month to	Leave	Paid Sabbatical					
Action Date - Start	Change Merit month to	Jan	Jun					
Action Date - End	Leave	Mar	Aug					
WARNING_Action	Leave w/Pay							
Tsfr to Dept	Retirement							
Primary College	Paid Sabbatical	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Hi
Severance	Suspension w/Pay	0	0	0	0	0	0	
	Term w/Severance							
	Termination							
	Transfer							
	Non paid Sabbatical							

INPUT - ADDITIONAL COMPENSATION

This tab allows you to input any compensation beyond the regular salary. Examples include such activities as summer teaching or departmental chair duties. You may also input lump sum payments.

	CUNNINGHAM, LARA M	FLETCHER, JENNIFER G	GUPPY, ROSE MARIE	JOHNSON, MARIE	MAJZEL, JOAN E	MALENSKY, NANCY	MCCRARY, SUSAN B
Base Salary	103,000	105,000	102,500	106,500	90,000	75,525	140,000
FTE %	100.00%	100.00%	100.00%	75.00%	100.00%	100.00%	100.00%
Salary	100,000	105,000	102,500	79,875	90,000	75,525	140,000
Market Salary	165,000	165,000	145,200	165,000	112,200	99,000	165,000
Merit % Recommended	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%
Rec. Merit Increase	4,000	4,200	4,100	3,195	3,600	3,021	5,600
Merit Adjustment \$	\$850	\$0	\$0	\$0	\$0	\$0	\$0
Merit Adjustment %	4.85%	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%
New Salary	104,850	109,200	106,600	83,070	93,600	78,546	145,600
Additional Pay Type	Department Chair	Summer Teaching					
Additional Pay Amount	5,000	6,000	0	0	0	0	0
Additional Pay_Start_Date	Sep	Jun					
Additional Pay_End_Date	Aug	Aug					
WARNING_Additional Pay							
Lump Sum Amount	3,000	0	0	0	0	0	0
Lump Sum Start_Date	Sep						
Lump Sum End_Date	Dec						
Other	500	0	0	0	0	0	0
Total Salary	108,350	109,200	106,600	83,070	93,600	78,546	145,600
Status	Active	Active	Active	Active	Active	Active	Active
Current Position	Full Professor	Full Professor	Associate Professor	Full Professor	Adjunct Professor	Sr Lecturer	Full Professor
Action	Change Merit month to:	Leave	Paid Sabbatical				
Action Date	Jan	Jan	Jun				
Severance	0	0	0	0	0	0	0

EXISTING EMPLOYEE SALARY CALC

This tab requires no input. It contains the results of any input from the above listed tabs. The data includes monthly salary and benefit amounts for each employee and for the faculty in total.

Existing Employee Information	Input - Existing Changes	Input - Additional Compensation	Existing Employee Salary Calc								Input - New Headcount	New Employee Salary Calc
Arts & Humanities	Base Scenario	CUNNINGHAM, LARA M	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Current Position	Full Professor	Full Professor	Full Professor	Full Professor	Full Professor	Full Professor	Full Professor	Full Professor	Full Professor	Full Professor	Full Professor	Full Professor
Tenure Status	Tenure Track	Tenure Track	Tenure Track	Tenure Track	Tenure Track	Tenure Track	Tenure Track	Tenure Track	Tenure Track	Tenure Track	Tenure Track	Tenure Track
Monthly Salary	7,692	7,692	7,692	11,538	7,692	7,692	7,692	7,692	7,692	7,692	7,692	11,538
Merit	0	0	0	0	93	93	93	93	93	93	93	62
Additional Pay	417	417	417	417	417	417	417	417	417	417	417	417
Lump Sum	750	750	750	750	0	0	0	0	0	0	0	0
Severance	0	0	0	0	0	0	0	0	0	0	0	0
Total Salary	8,859	8,859	8,859	12,705	8,202	8,202	8,202	8,202	8,202	8,202	8,202	12,017
Total Fringe	2,215	2,159	2,146	3,003	2,029	2,029	2,029	2,029	2,029	2,029	2,029	2,913
Total Salary & Fringe	11,074	11,018	11,005	15,708	10,231	10,231	10,231	10,231	10,231	10,231	10,231	14,930
Primary College Salary	8,859	8,859	8,859	12,705	8,202	8,202	8,202	8,202	8,202	8,202	8,202	12,017
Primary College Fringe	2,215	2,159	2,146	3,003	2,029	2,029	2,029	2,029	2,029	2,029	2,029	2,913
Total Primary Salary & Fringe	11,074	11,018	11,005	15,708	10,231	10,231	10,231	10,231	10,231	10,231	10,231	14,930
Headcount	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Social Security	678	678	678	972	627	627	627	627	627	627	627	919
Medicare	128	128	128	184	119	119	119	119	119	119	119	174
SUI	44	44	31	0	0	0	0	0	0	0	0	0
FUTA	56	0	0	0	0	0	0	0	0	0	0	0
Retirement	769	769	769	1,154	769	769	769	769	769	769	769	1,154
Other Benefits	354	354	354	508	328	328	328	328	328	328	328	481
Health Plan Expense	185	185	185	185	185	185	185	185	185	185	185	185
Dependent Tuition Paid	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Health Plan	Individual + 1	Individual + 1	Individual + 1	Individual + 1	Individual + 1	Individual + 1	Individual + 1	Individual + 1	Individual + 1	Individual + 1	Individual + 1	Individual + 1

INPUT – NEW HEADCOUNT

Use this tab to input new faculty required. Details include employee status, tenure, position, location, salary and benefits, additional compensation, contract start and end dates, and allocation to primary and other departments and colleges.

	1	2	3	4	5	6	7	8	9
Position	Adjunct Professor	St Lecturer	Technical Officer	Assistant Professor	Research Assistant	Lecturer	Technical Officer	Postdoctoral Research Associate	
Employee Name	Mary Smith	Allan Barker	Nancy Nolan	Elton Johnson	Norris Gilbert	William Waring	Olivia Newton	Raymond Blair	
FTE %	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	0.00%
Requisition Date									
Req Filled (Y/N)	Yes	Yes	Yes	No	No	Yes	Yes	No	No
FT/PT	FT	FT	FT	FT	FT	FT	FT	FT	FT
Tenure Status	Fixed Term Contract	Tenure Track	Fixed Term Contract	Tenure Track	Fixed Term Contract	Tenure Track	Fixed Term Contract	Tenure Track	
Warning Status									
Start Date	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep
End Date	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug
Market Salary	112,200	99,000	67,650	132,000	79,200	85,800	67,650	68,200	0
Target Base	112,200	99,000	67,650	132,000	79,200	85,800	67,650	68,200	0
Market Adjustment	5,000	10,000	10,000	15,000	6,000	10,000	12,000	20,000	0
Hiring Salary	117,200	109,000	77,650	147,000	85,200	95,800	79,650	88,200	0
Primary College	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities	Arts & Humanities	
Primary Dept	1004	1004	1001	1004	1004	1002	1001	1003	
Primary Department Name	Humanities	Humanities	English Literature	Humanities	Humanities	History	English Literature	Art History	
Research Group									
Primary Dept%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	0.00%
Warning Department									
2nd Dept									
2nd Dept Name									
2nd College									
2nd Dept%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
3rd Dept									
3rd Dept Name									
3rd College									
3rd Dept%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Dependents Eligible	0	0	0	0	0	0	0	0	0
Change Merit Month to:									
Campus									
Location	St Paul, MN	Minneapolis, MN	St Paul, MN	Bloomington, MN	St Paul, MN	Minneapolis, MN	St Paul, MN	Bloomington, MN	
Health Plan	Family Plan	Individual Plan	Individual + 1	Individual + 1	Family Plan	Individual Plan	Individual + 1	Individual + 1	
Recommended Merit %	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%	4.00%
Merit Month	Apr	Apr	Apr	Apr	Apr	Apr	Apr	Apr	Apr
WARNING: Additional Pay									
Additional Pay Type	Advisory				Advisory				
Additional Pay Amount	2,500	0	0	0	2,500	0	0	0	0
Additional Pay Start Date	Sep				Apr				
Additional Pay End Date	Jan				Jul				
Lump Sum Description									
Lump Sum Amount	0	0	0	0	0	0	0	0	0
Lump Sum Start Date									
Lump Sum End Date									
Other	0	0	0	0	0	0	0	0	0

Current owner: Administrator

NEW EMPLOYEE SALARY CALC

This tab, like the Existing Employee Salary Calc, is an output of information derived from the tab above: Input – New Headcount. The data displayed includes monthly salary and benefit amounts for each new position and for all new faculty positions in total.

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Position	Adjunct Professor								
Employee Name	Mary Smith								
Tenure Status	Fixed Term Contract								
FTE %	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Base Salary	117,200	117,200	117,200	117,200	117,200	117,200	117,200	117,200	117,200
Monthly Salary	9,015	9,015	9,015	13,523	9,015	9,015	9,015	9,015	9,015
Merit	0	0	0	0	0	0	0	0	90
Additional Pay	500	500	500	500	500	0	0	0	0
Lump Sum	0	0	0	0	0	0	0	0	0
Total Salary	9,515	9,515	9,515	14,023	9,515	9,015	9,015	9,015	9,015
Total Fringe	2,472	2,416	2,393	3,409	2,368	2,323	2,323	2,323	2,323
Total Salary and Fringe	11,987	11,931	11,908	17,432	11,883	11,338	11,338	11,338	11,338
Primary College Salary	9,515	9,515	9,515	14,023	9,515	9,015	9,015	9,015	9,015
Primary College Fringe	2,472	2,416	2,393	3,409	2,368	2,323	2,323	2,323	2,323
Total Primary Salary & Fringe	11,987	11,931	11,908	17,432	11,883	11,338	11,338	11,338	11,338
Headcount	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Social Security	727.93	727.93	727.93	1,072.77	727.93	689.68	689.68	689.68	689.68
Medicare	137.97	137.97	137.97	203.33	137.97	130.72	130.72	130.72	130.72
Retirement	902	902	902	1,352	902	902	902	902	902
SUII	47.58	47.58	24.85	0.00	0.00	0.00	0.00	0.00	0.00
FUTA	56.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Benefits	360.62	360.62	360.62	540.92	360.62	360.62	360.62	360.62	360.62
Health Plan	Family Plan	Family Plan	Family Plan	Family Plan	Family Plan	Family Plan	Family Plan	Family Plan	Family Plan
Health Plan Cost	240	240	240	240	240	240	240	240	240

HEADCOUNT AND COMPENSATION SUMMARY

This tab does not require input. It contains consolidated summary headcount, compensation, and fringe expenses for all existing and new employees in the college. It also contains information on the amount of internal faculty funding of compensation.

	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total Year
Total Employee Compensation	139,986	139,986	139,986	209,146	131,253	130,753	138,830	140,146	140,146	211,044	142,146	141,521	1,804,941
Total Employee Fringe	38,108	37,217	36,988	52,681	34,284	34,239	36,335	36,475	36,020	49,565	33,579	31,748	457,237
Total Comp & Fringe	178,094	177,203	176,974	261,827	165,537	164,991	175,164	176,620	176,165	260,609	175,724	173,269	2,262,178
College portion Comp	125,433	125,433	125,433	187,316	122,353	121,853	124,276	125,446	125,446	187,717	126,046	125,421	1,622,172
College portion Fringe	33,453	32,647	32,439	46,460	31,269	31,223	31,852	31,979	31,524	43,168	28,899	27,122	402,034
Total College Comp	158,886	158,079	157,872	233,775	153,621	153,076	156,128	157,425	156,970	230,884	154,946	152,543	2,024,207
Funded Amount	178,095	177,205	179,117	261,827	165,538	164,993	175,166	176,621	176,166	260,610	175,724	173,268	2,264,330
Variance Comp_Funding	1	2	2,142	0	1	2	2	1	1	1	0	(1)	2,152
Headcount	17.75	17.75	17.75	17.75	16.75	16.75	17.75	17.75	17.75	17.75	17.75	17.75	17.75

FUND ATTRIBUTES

Data in this tab may be imported from an existing application (such as the university general ledger) or it may be input manually. It shows the existing college funds and related information. The fund description is free form text, while the other data fields are from a drop down selection. The department name is automatically populated when the department number is input. Note the error message if input is incorrect. In this case the fund end date precedes the start date.

Total Funds	Department No	Department	Fund Description	Fund Open?	Fund Start Date	Fund End Date	Fund Amount	Warning
10000-0	1001	English Literature	General Operating Fund	Yes	Sep	Aug	\$1,200,000	
10100_1	1004	Humanities	Television & Amer. Culture	Yes	Aug	Jul	\$400,000	Error - Ending Date Prior to Starting Date
10100_2	1001	English Literature	16th Century Poetry	Yes	Jan	May	\$230,000	
10100_3	1001	English Literature	17th Century Poetry	Yes	Jun	Aug	\$220,000	
10200_0	1002	History	European History	Yes	Sep	Aug	\$275,000	
10300_0	1003	Art History	Netherlands artists	Yes	Sep	Aug	\$150,000	
10500_0	1004	Humanities		Yes	Sep	Aug	\$130,000	
Other College Fund			Other College Fund	Yes	Sep	Aug	\$25,000	
Total Funds							\$2,630,000	

NEW FUND REQUEST

Use this tab to input new funding. The fund group input is a drop-down selection, as is fund type. The choices included in our example include:

- College operating fund
- Competitive research
- Consultancy
- Contract research
- Government sponsored research
- Non-contract research

Other data includes the organization (such as research group) department number, description, amount, start and end dates, as well as probability of success in securing the fund. This data may trigger a process that would add it to the existing fund list, thereby making the new fund available for allocation.

Fund Group	Fund Type	College	Organization	Department No	Department	Fund Description	Probability of Success	Anticipated Start Date	Anticipated End Date	Fund Amount	Warning
Fund 1	Restricted Gift	Competitive Research	Arts & Humanities	1003	Art History	Renaissance Art	95.00%	Jan	Aug	\$20,000	
Fund 2	Unrestricted Gift						0.00%			\$0	
Fund 3	Restricted Gift						0.00%			\$0	
Fund 4	Restricted Endowment						0.00%			\$0	
Fund 5	Unrestricted Endowment						0.00%			\$0	
Fund 6	Sponsored						0.00%			\$0	
Fund 7	Government Grant						0.00%			\$0	
Fund 7	Non-Govt Grant						0.00%			\$0	
Total Funds	Operating Fund						95.00%			\$20,000	

EXISTING EMPLOYEE FUNDING

This tab lets you make the initial distribution of funds to existing employees. The current view shows the available existing funds as well as their descriptions and fund start and end dates. This tab also includes the scenarios dimension. This allows you to plan various funding scenarios for each employee by indicating the percent of fund for salary and fringe as well as the start funding and end funding dates. As can be seen in the example below, this employee's compensation will be 100 percent funded from fund 10100_1 from September through December. From January through May the funding will be from fund 10100_2. The data here will go to a monthly tab.

Existing Employee Salary Calc		Input - New Headcount		New Employee Salary Calc		Headcount & Compensation Summary		Fund Attributes		New Fund Request		Existing Employee Funding	
Arts & Humanities		Base Scenario		CUNNINGHAM, LARA M									
	10000_0	10100_1	10100_2	10100_3	10200_0	10300_0	10500_0	Other College Fund					
Fund Open?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes			Yes
Fund Description	General Operating Fund	Television & Amer. Culture	16th Century Poetry	17th Century Poetry	European History	Netherlands artists							Other College Fund
Fund % Salary	0.00%	100.00%	100.00%	50.00%	100.00%	0.00%	0.00%						0.00%
Fund % Fringe	0.00%	100.00%	100.00%	50.00%	100.00%	0.00%	0.00%						0.00%
Start Funding	Sep	Sep	Jan	Jun	Sep	Sep	Sep						Sep
End Funding	Aug	Dec	May	Aug	Aug	Aug	Aug						Aug
Warning													
Fund Start Date	Sep	Sep	Jan	Jun	Sep	Sep	Sep						Sep
Fund End Date	Aug	Dec	May	Aug	Aug	Aug	Aug						Aug
Enter Other College Fund													

EXISTING EMP FUNDING MONTHLY

This tab contains data linked in from the Existing Employee Funding tab shown above. In this tab the user may make detailed monthly changes to the funding. You do this by entering additions or subtractions to the Adjustment Salary % or the Adjustment Fringe % by month for each fund to calculate a new Revised Fund % Salary or Revised Fund % Fringe.

Input - New Headcount		New Employee Salary Calc		Headcount & Compensation Summary		Fund Attributes		New Fund Request		Existing Employee Funding		Existing Emp Funding Mthly	
Arts & Humanities		Base Scenario		CUNNINGHAM, LARA M									
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun		
Total Funds	Fund % Salary	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	150.00%
	Fund % Fringe	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	200.00%	150.00%
	Adjustment Salary%	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)
	Adjustment Fringe%	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)	(100.00%)
	Revised Fund % Salary	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
	Revised Fund % Fringe	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
	Funded % Salary (Hidden)	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%
	Funded % Fringe (Hidden)	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%	350.00%
	Fund % Salary	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Fund % Fringe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Adjustment Salary%	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	
Adjustment Fringe%	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	
Revised Fund % Salary	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	
Revised Fund % Fringe	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	
Start Funding	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	
End Funding	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	
Current_Mo_(Hidden)	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jun	Jun	
Fund this month_(Hidden)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Funded % Salary (Hidden)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Funded % Fringe (Hidden)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Fund % Salary	100.00%	100.00%	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Fund % Fringe	100.00%	100.00%	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Adjustment Salary%	(50.00%)	(50.00%)	(50.00%)	(50.00%)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	(50.00%)	
Adjustment Fringe%	(50.00%)	(50.00%)	(50.00%)	(50.00%)	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	(50.00%)	
Revised Fund % Salary	50.00%	50.00%	50.00%	50.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Revised Fund % Fringe	50.00%	50.00%	50.00%	50.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Start Funding	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	
End Funding	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	
Current_Mo_(Hidden)	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jun	Jun	
Fund this month_(Hidden)	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	
Funded % Salary (Hidden)	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	
Funded % Fringe (Hidden)	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	
Fund % Salary	0.00%	0.00%	0.00%	0.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	0.00%	
Fund % Fringe	0.00%	0.00%	0.00%	0.00%	0.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	0.00%	
Adjustment Salary%	0.00%	0.00%	0.00%	0.00%	0.00%	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	0.00%	
Adjustment Fringe%	0.00%	0.00%	0.00%	0.00%	0.00%	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	(50.00%)	0.00%	
Revised Fund % Salary	0.00%	0.00%	0.00%	0.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	0.00%	
Revised Fund % Fringe	0.00%	0.00%	0.00%	0.00%	0.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	0.00%	

EXISTING EMP FUNDING CALC

This is an output tab. It shows the resulting funded salary and fringe by month for all funds for each employee.

New Employee Salary Calc		Headcount & Compensation Summary		Fund Attributes		New Fund Request		Existing Employee Funding		Existing Emp Funding Mthly		Existing Emp Fund_Calc		
Arts & Humanities		Base Scenario		Total Funds		CUNNINGHAM, LARA M								
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total Year
Funded Salary	8,859	8,859	8,859	12,705	8,202	8,202	8,202	8,202	8,202	12,017	8,202	8,202	8,202	108,713
Funded Fringe	2,215	2,159	2,146	3,003	2,029	2,029	2,029	2,029	2,029	2,913	2,029	1,515	1,515	26,125
Employee Comp	8,859	8,859	8,859	12,705	8,202	8,202	8,202	8,202	8,202	12,017	8,202	8,202	8,202	9,059
Employee Fringe	2,215	2,159	2,146	3,003	2,029	2,029	2,029	2,029	2,029	2,913	2,029	1,515	1,515	2,177

EXISTING EMP ALLOCATION CHECK

This tab, like the one above, is an output tab. It is a quick view for each employee of any funding allocation imbalances or issues. The data here is also available in reports.

Fund Attributes New Fund Request Existing Employee Funding Existing Emp Funding Mthly Existing Emp Fund_Calc Existing Emp Allocation Check New Employee Funding												
Arts & Humanities Base Scenario Allocation Warning												
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
CUNNINGHAM, LARA M												
FLETCHER, JENNIFER G												
GUPPY, ROSE MARIE												
JOHNSON, MARIE												
MAJZEL, JOAN E												
MALENSKY, NANCY												
MCCRARY, SUSAN B												
MCQUERN-WEBB, MARLYN J												
MIZEUR, EVA												
PACKENHAM, NANCY J												

NEW EMPLOYEE FUNDING

This tab is identical to the Existing Employee Funding tab shown above. As in that tab, it shows the available funds, their descriptions, and start and end dates. It also includes the scenarios dimension. As above, it allows you to plan various funding scenarios for each new employee by indicating the percent of fund for salary and fringe as well as the start funding and end funding dates. The data here will go to a monthly tab.

Fund Attributes New Fund Request Existing Employee Funding Existing Emp Funding Mthly Existing Emp Fund_Calc Existing Emp Allocation Check New Employee Funding									
Arts & Humanities Base Scenario 1									
	10000_0	10100_1	10100_2	10100_3	10200_0	10300_0	10500_0	Other College Fund	
Position	Adjunct Professor	Adjunct Professor	Adjunct Professor	Adjunct Professor	Adjunct Professor	Adjunct Professor	Adjunct Professor	Adjunct Professor	Adjunct Professor
Employee Name	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith
Fund Open?	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Fund Description	General Operating Fund	Television & Amer. Culture	15th Century Poetry	17th Century Poetry	European History	Netherlands artists	20th Century Urban Culture	Other College Fund	
Fund % Salary	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Fund % Fringe	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Start Funding	Sep	Sep							
End Funding	Aug	Dec							
Warning									
Fund Start Date	Sep	Sep	Jan	Jun	Sep	Sep	Sep	Sep	Sep
Fund End Date	Aug	Dec	May	Aug	Aug	Aug	Aug	Aug	Aug
Enter Other College Fund									

NEW EMP FUNDING MTHLY

This tab is identical to the Existing Emp Funding Monthly tab shown above. As in that tab, the user can adjust the funding by month for each new employee. You do this by entering additions or subtractions to the Adjustment Salary % or the Adjustment Fringe % by month for each fund to calculate a new Revised Fund % Salary or Revised Fund % Fringe.

New Fund Request		Existing Employee Funding		Existing Emp Funding Mthly		Existing Emp Fund_Calc		Existing Emp Allocation Check		New Employee Funding		New Emp Funding Mthly	
Arts & Humanities		Base Scenario											
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	
Total Funds	Fund % Salary	200.00%	200.00%	200.00%	200.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
	Fund % Fringe	200.00%	200.00%	200.00%	200.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
	Adjustment Salary%	(100.00)%	(100.00)%	(100.00)%	(100.00)%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Adjustment Fringe%	(100.00)%	(100.00)%	(100.00)%	(100.00)%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Revised Fund % Salary	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Revised Fund % Fringe	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	
10000_0	Employee Name	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith
	Fund % Salary	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
	Fund % Fringe	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
	Adjustment Salary%	(50.00)%	(50.00)%	(50.00)%	(50.00)%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Adjustment Fringe%	(50.00)%	(50.00)%	(50.00)%	(50.00)%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Revised Fund % Salary	50.00%	50.00%	50.00%	50.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Revised Fund % Fringe	50.00%	50.00%	50.00%	50.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%
Start Funding	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep
End Funding	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug	Aug
10100_1	Employee Name	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith
	Fund % Salary	100.00%	100.00%	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Fund % Fringe	100.00%	100.00%	100.00%	100.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Adjustment Salary%	(50.00)%	(50.00)%	(50.00)%	(50.00)%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Adjustment Fringe%	(50.00)%	(50.00)%	(50.00)%	(50.00)%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Revised Fund % Salary	50.00%	50.00%	50.00%	50.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Revised Fund % Fringe	50.00%	50.00%	50.00%	50.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Start Funding	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep	Sep
End Funding	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec	Dec
10100_2	Employee Name	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith	Mary Smith
	Fund % Salary	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Fund % Fringe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Adjustment Salary%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Adjustment Fringe%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Revised Fund % Salary	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Revised Fund % Fringe	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	
Start Funding													
End Funding													

NEW EMP FUND CALC

This tab is the same as the Existing Emp Fund Calc. The output here shows the total salary, fringe, and funding for each new employee.

Existing Employee Funding		Existing Emp Funding Mthly		Existing Emp Fund_Calc		Existing Emp Allocation Check		New Employee Funding		New Emp Funding Mthly		New Emp Fund_Calc		
Arts & Humanities		Total Funds		Base Scenario										
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total Year
Funded Salary	9,515	9,515	9,515	14,023	9,515	9,015	9,015	9,015	9,015	13,523	9,015	9,015	119,696	
Funded Fringe	2,472	2,416	2,393	3,409	2,368	2,323	2,323	2,323	2,323	3,364	1,658	1,633	29,005	
Employee Comp	9,515	9,515	9,515	14,023	9,515	9,015	9,015	9,015	9,015	13,523	9,015	9,015	9,975	
Employee Fringe	2,472	2,416	2,393	3,409	2,368	2,323	2,323	2,323	2,323	3,364	1,658	1,633	2,417	

NEW EMP ALLOCATION CHECK

This tab is output only and will show any potential issues with over- or under-funded new employees. As shown, there are no problems.

Existing Emp Funding Mthly		Existing Emp Fund_Calc		Existing Emp Allocation Check		New Employee Funding		New Emp Funding Mthly		New Emp Fund_Calc		New Emp Allocation Check	
Arts & Humanities		Base Scenario		Allocation Warning									
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	
1													
2													
3													
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													

FUND SUMMARY

This tab is an output tab showing fund data for each month and fund. The drop-down list displays different information for each fund.

Existing Emp Fund_Calc		Existing Emp Allocation Check		New Employee Funding		New Emp Funding Mthly		New Emp Fund_Calc		New Emp Allocation Check		Fund Summary		Funding by Type	
Arts & Humanities		Base Scenario		Fund Amount Used											
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total Year		
Total Funds	170,095	177,205	179,117	261,827	165,530	164,993	175,166	176,621	176,166	260,610	175,724	173,268	2,264,330		
10000_0	96,239	95,783	97,750	142,027	115,222	114,677	114,667	116,012	115,557	168,610	112,853	111,168	1,400,564		
10100_1	42,100	41,872	41,840	61,725	0	0	0	0	0	0	0	0	187,537		
10100_2	0	0	0	0	21,850	21,850	21,850	21,850	21,850	0	0	0	109,248		
10100_3	0	0	0	0	0	0	0	0	0	32,412	21,850	21,593	75,854		
10200_0	21,353	21,241	21,227	30,862	10,231	10,231	20,414	20,505	20,505	32,407	22,767	22,253	253,996		
10300_0	7,807	7,765	7,758	11,526	7,727	7,727	7,727	7,727	7,727	11,498	7,727	7,727	100,443		
10500_0	8,625	8,573	8,571	12,731	8,537	8,537	8,537	8,537	8,537	12,713	8,537	8,537	110,972		
Other College Fund	1,971	1,971	1,971	2,957	1,971	1,971	1,971	1,991	1,991	2,970	1,991	1,991	25,717		

By reorienting the dimensions we see a different view of this tab. In the example below we see the fund data such as remaining amount for each fund for the total year.

Existing Emp Fund_Calc		Existing Emp Allocation Check		New Employee Funding		New Emp Funding Mthly		New Emp Fund_Calc		New Emp Allocation Check		Fund Summary		Funding by Type	
Arts & Humanities		Base Scenario		Total Year											
	Fund Amount Used	Total Fund Amt Available	Fund Remaining	Funded Internally	Funded Externally	Fund Amount									
Total Funds	2,264,330	663,938	490,670	2,230,613	25,717	2,755,000									
10000_0	1,400,564	(89,396)	(200,564)	1,400,564	0	1,200,000									
10100_1	187,537	212,464	212,464	187,537	0	400,000									
10100_2	109,248	120,753	120,753	109,248	0	230,000									
10100_3	75,854	165,739	144,146	75,854	0	220,000									
10200_0	253,996	43,257	21,004	253,996	0	275,000									
10300_0	100,443	57,284	49,557	100,443	0	150,000									
10500_0	110,972	27,565	19,028	110,972	0	130,000									
Other College Fund	25,717	126,274	124,283	0	25,717	150,000									

FUNDING BY TYPE

This output tab shows funds by type. We have reoriented the dimensions to show two different views of this tab. You can easily modify the funding type dimension. This data was initially captured in the fund attributes tab.

Existing Emp Fund_Calc	Existing Emp Allocation Check	New Employee Funding	New Emp Funding Mthly	New Emp Fund_Calc	New Emp Allocation Check	Fund Summary	Funding by Type						
Arts & Humanities													
Base Scenario													
Fund Amount Used													
	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Total Year
College Operating Fund	98,210	97,754	99,721	144,984	117,194	116,649	116,639	118,003	117,548	171,580	114,844	113,159	1,426,281
Competitive Research	0	0	0	0	21,850	21,850	21,850	21,850	21,850	32,412	21,850	21,593	185,102
Consultancy	8,625	8,573	8,571	12,731	8,537	8,537	8,537	8,537	8,537	12,713	8,537	8,537	110,972
Contract Research	71,250	70,878	70,825	104,113	17,958	17,958	28,141	28,232	26,232	43,905	30,494	29,980	541,976
Government Sponsored Research	0	0	0	0	0	0	0	0	0	0	0	0	0
Non-Contract Research	0	0	0	0	0	0	0	0	0	0	0	0	0

Existing Emp Fund_Calc	Existing Emp Allocation Check	New Employee Funding	New Emp Funding Mthly	New Emp Fund_Calc	New Emp Allocation Check	Fund Summary	Funding by Type
Arts & Humanities							
Base Scenario							
Total Year							
	Fund Amount Used	Total Fund Amt Available	Fund Remaining	Funded Internally	Funded Externally	Fund Amount	
College Operating Fund	1,426,281	36,878	(76,281)	0	1,426,281	1,350,000	
Competitive Research	185,102	286,491	264,899	0	185,102	450,000	
Consultancy	110,972	27,565	19,028	110,972	0	130,000	
Contract Research	541,976	313,005	283,025	0	541,976	825,000	
Government Sponsored Research	0	0	0	0	0	0	
Non-Contract Research	0	0	0	0	0	0	

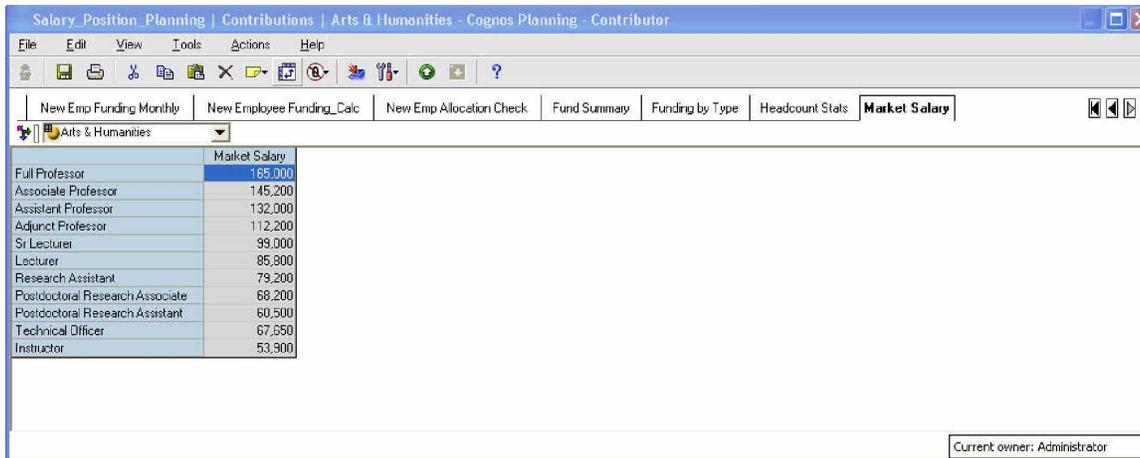
HEADCOUNT STATS

This is an output summary tab capturing data on faculty position and tenure status for the college.

Existing Emp Allocation Check	New Employee Funding	New Emp Funding Mthly	New Emp Fund_Calc	New Emp Allocation Check	Fund Summary	Funding by Type	Headcount Stats
Arts & Humanities							
Base Scenario							
Headcount							
	Tenure	Tenure Track	Non-Tenure	Fixed Term Contract			
Full Professor	2.00	1.00	0.75	0.00			
Associate Professor	0.00	1.00	0.00	1.00			
Assistant Professor	1.00	2.00	1.00	1.00			
Adjunct Professor	1.00	1.00	2.00	1.00			
Sr Lecturer	1.00	1.00	2.00	2.00			
Lecturer	1.00	1.00	1.00	1.00			
Research Assistant	1.00	1.00	1.00	1.00			
Postdoctoral Research Associate	1.00	1.00	1.00	1.00			
Postdoctoral Research Assistant	0.00	0.00	0.00	0.00			
Technical Officer	2.00	2.00	2.00	2.00			
Instructor	0.00	0.00	0.00	0.00			

MARKET SALARY

This is an optional cube and is typically shown as a read-only. It contains information about standard faculty positions. It is assumed that this data is publicly available. In this blueprint the data is linked to the Input New Employee tab to provide a guideline for planning new employee salaries.



The screenshot shows a software window titled "Salary_Position_Planning | Contributions | Arts & Humanities - Cognos Planning - Contributor". The window has a menu bar (File, Edit, View, Tools, Actions, Help) and a toolbar. Below the toolbar is a navigation pane with tabs: "New Emp Funding Monthly", "New Employee Funding_Calc", "New Emp Allocation Check", "Fund Summary", "Funding by Type", "Headcount Stats", and "Market Salary". The "Market Salary" tab is active. The main area displays a table with the following data:

	Market Salary
Full Professor	165,000
Associate Professor	145,200
Assistant Professor	132,000
Adjunct Professor	112,200
Sr Lecturer	99,000
Lecturer	85,800
Research Assistant	79,200
Postdoctoral Research Associate	68,200
Postdoctoral Research Assistant	60,500
Technical Officer	67,650
Instructor	53,900

At the bottom right of the window, it says "Current owner: Administrator".

CONCLUSION

The IBM Cognos Salary and Position Planning Performance Blueprint is built on the collected wisdom of education leaders and performance management experts. It helps you quickly align your goals, plans, people, and activities so you can achieve the optimal faculty position plan. In conjunction with the IBM Cognos Enrollment and Tuition Planning Blueprint, universities and colleges can maximize their performance planning management system.

Used with this blueprint, Cognos performance management software gives you a consistent and verifiable tool for a more rigorous planning process.

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Staffed globally by experts in planning, technology, and performance and strategy management, the Innovation Center partners with more than 600 Cognos customers, academics, industry leaders, and others seeking to accelerate adoption, reduce risk, and maximize the impact of technology-enabled performance management practices.