

# Oracle EPM Training

## Budget Planner Training

Prepared for Boston Budget Planners  
January 2025

# Welcome!

- This is a training on UMass's new tool for budget management and the process for the FY27 annual budget process
- Starting in the next Fiscal Year 2027, UMass will use Oracle EPM for annual planning and in-year adjustments
- In January 2026, Budget Planners will use Oracle EPM reports to review budgets and discuss changes with the Budget Office
- Eventually, Budget Planners will update budgets directly in Oracle EPM

# Topics

- **Overview & Learning Objectives**
- **FY27 Budget Process**
- **Oracle EPM: Background on New Budgeting Tool**
- **Terminology & Concepts**
- **Logging in & Navigation**
- **Reviewing the Annual Budget using Oracle Reports**
- **Support Resources**

# Overview & Learning Objectives

# Overview & Learning Objectives

- This training is for **Budget Planners** who are UMass employees with budget responsibility.
- In Fiscal Year 2027, UMass is transitioning to Oracle EPM (Enterprise Performance Management) for all aspects of budget management
- This training is designed to help Budget Planners:
  - Build familiarity with Oracle EPM
  - Review the Annual Budget using Oracle EPM reports

## Learning Objectives

- Understand new terminology
- Access Oracle EPM and navigating its interface
- Viewing relevant reports
- Communicating changes to the budget office

# FY27 Budget Process

# FY27 Budget Expectations

- Elevate budget to ensure discussion of material, strategic ideas and challenges
  - Relate overall University Enrollment and Tuition to area budgets
  - Address strategic initiatives, risks, opportunities, challenges, efficiencies
  - Use high level report views to foster meaningful conversations
  - Document in a presentation deck that can be referenced in future
- Initial budget data is being loaded, await further notification from Budget Office

# FY27 Budget Planning Timeline

For the upcoming Annual Budget Process (FY27), Budget Managers will be reviewing data in Powerpoint decks provided by the Budget Office.

Jan 5	Jan 12	Jan 19	Jan 26	Feb 2	Feb 9	Feb 16	Feb 23	Mar 2	Mar 9
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EPM Opens

Training



Email Deck to Leaders  
& Business Area

Review Deck with  
Business Area

Check-ins

Review & Lock  
Deck

Leadership  
Meetings

Budget  
Consolidation  
& Cutoff

Business  
Managers

Budget Office

Business Mgrs +  
Budget Office

Bus Mgrs + Budget  
Office + Leadership

# Background on New Budgeting Tool

**ORACLE®**  
ENTERPRISE PERFORMANCE  
MANAGEMENT CLOUD

# What is Oracle EPM?

- **A modern, cloud-based platform** that enables forecasting and collaboration across UMass's different structures, funding models, and budgeting needs
- **A common platform** for budgeting and forecasting that supports standardization across UMass while configuring to unique campus needs



# UMass's Transition to Oracle EPM

## Axiom: UM-Plan (FY2026 and Prior)



Hosted program with limited configurability and innovation



Separate planning files.  
Lots of Excel



No In-Year Planning  
Adjustments



## Oracle EPM FY2027 - Onward



Modern cloud best-of-breed platform



Single interactive tool  
for budget planning



In Year Planning  
always available

# Terminology & Concepts

# Oracle EPM – Features & Terminology

Visual	Term	Details
 Annual Budget	<b>Cards</b>	Clickable Tiles on the Home Page Opens a Form (ex: Annual Budget)
	<b>Forms</b>	Interactive screens where Budget Planners: <ol style="list-style-type: none"><li>1. Review prior year data</li><li>2. Adjust forecasts</li></ol>
	<b>Vertical Navigation Tabs</b>	The Major Steps of the Workflow (ex: Labor Planning) We step through them using icons on the <b>left side</b> of a Form.
	<b>Horizontal Navigation Tabs</b>	Separate Forms within a Workflow Step We step through them on the bottom of the Form Some are interactive (for input). Others are report only

# Key Budget Terms Used in the Processes & Tools

Term	Definition
<b>Budget Account Category</b>	These are the revenue and expense budget categories for planning. For the most part these are UM Plan account categories with a few very minor changes.
<b>Home Department</b>	The primary department to which a position or employee is assigned
<b>Union Code</b>	The collective bargaining unit or union affiliation of a position or employee
<b>Fund Groupings for Annual Budget Planning</b>	Operational Fund groupings, summary point introduced with this software and our operations.
<b>HR Combo Code</b>	Code that stands for the fund, department, project, program, or class.

# Logging in & Navigation

# Accessing Oracle EPM

A login link to Oracle EPM is available on the Budget Office Website



The screenshot shows the UMass Boston website with a blue header. The header includes the UMass Boston logo, a search bar, and navigation links for Admissions, Academics, Campus Life, Research, About, and Athletics. Below the header is a dark blue navigation bar with links for Current Students, Parents & Families, Faculty & Staff, and Alumni. The main content area has a white background. At the top of the content area, there is a breadcrumb navigation: Home — Budget — Enterprise Performance Management Budgeting & Planning. To the left, there is a vertical sidebar with a "Menu" heading and several links: Business Partnership, Capital Budgeting, Contact, Form, Operating Budget, Policies, Quarterly Variance Reporting, and Enterprise Performance Management Budgeting & Planning. The main content area features a large blue title: "Enterprise Performance Management Budgeting & Planning". Below the title, there is a paragraph of text: "The Office of Budget & Financial Planning administers the software tool used to budget and forecast for the UMass Boston campus. This section is for members who have access to the tool. Authorized users can review and access their proposed fiscal year budget among other features." Further down, there is another paragraph: "Access the Enterprise Performance Management (EPM) software by clicking the login button. To request access contact the Office of Budget and Financial Planning at [OBFP@UMB.edu](mailto:OBFP@UMB.edu)." At the bottom of the content area, there is a "Login for Authorized Users" button and a "Resources" section with a link to "2027 Budget Process and New Budgeting Tool Introduction".

# Oracle EPM: Navigating the Home Page – Top navigation

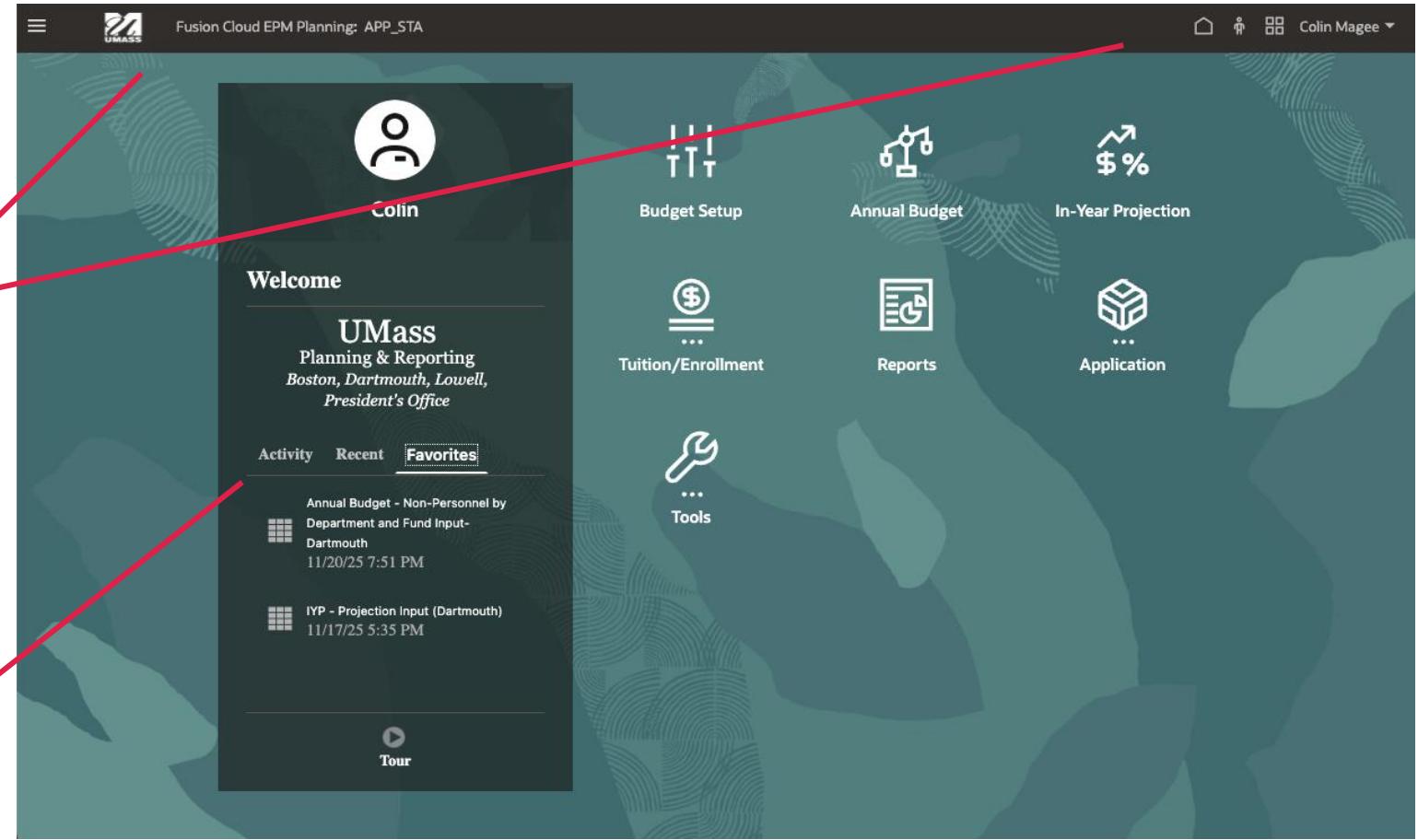
Use the top navigation features to access settings and return to the homepage

The top navigation has two important features:

- The menu
- The user setting



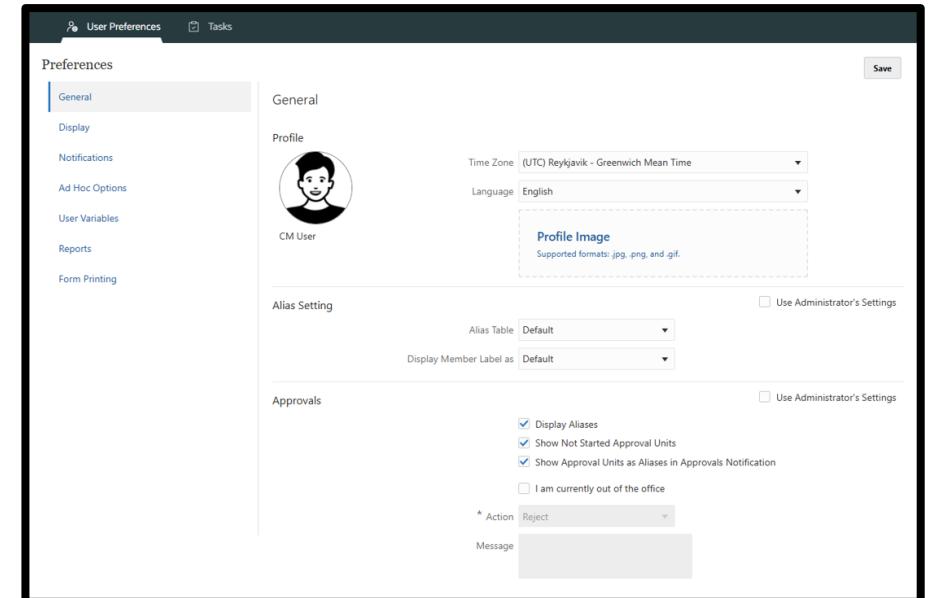
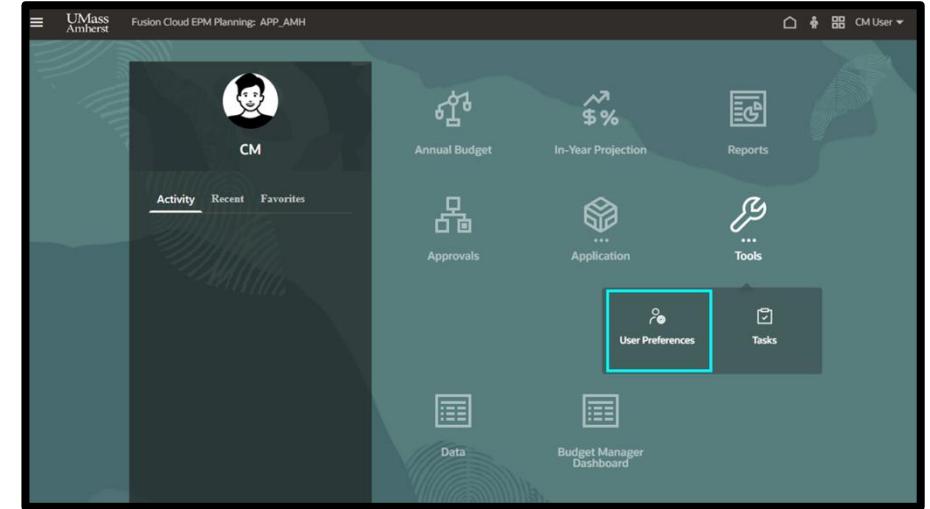
Recent budget files and reports will also be available in your activity list. Select the Star icon on the right to add them to your Favorites



# Setting User Preferences

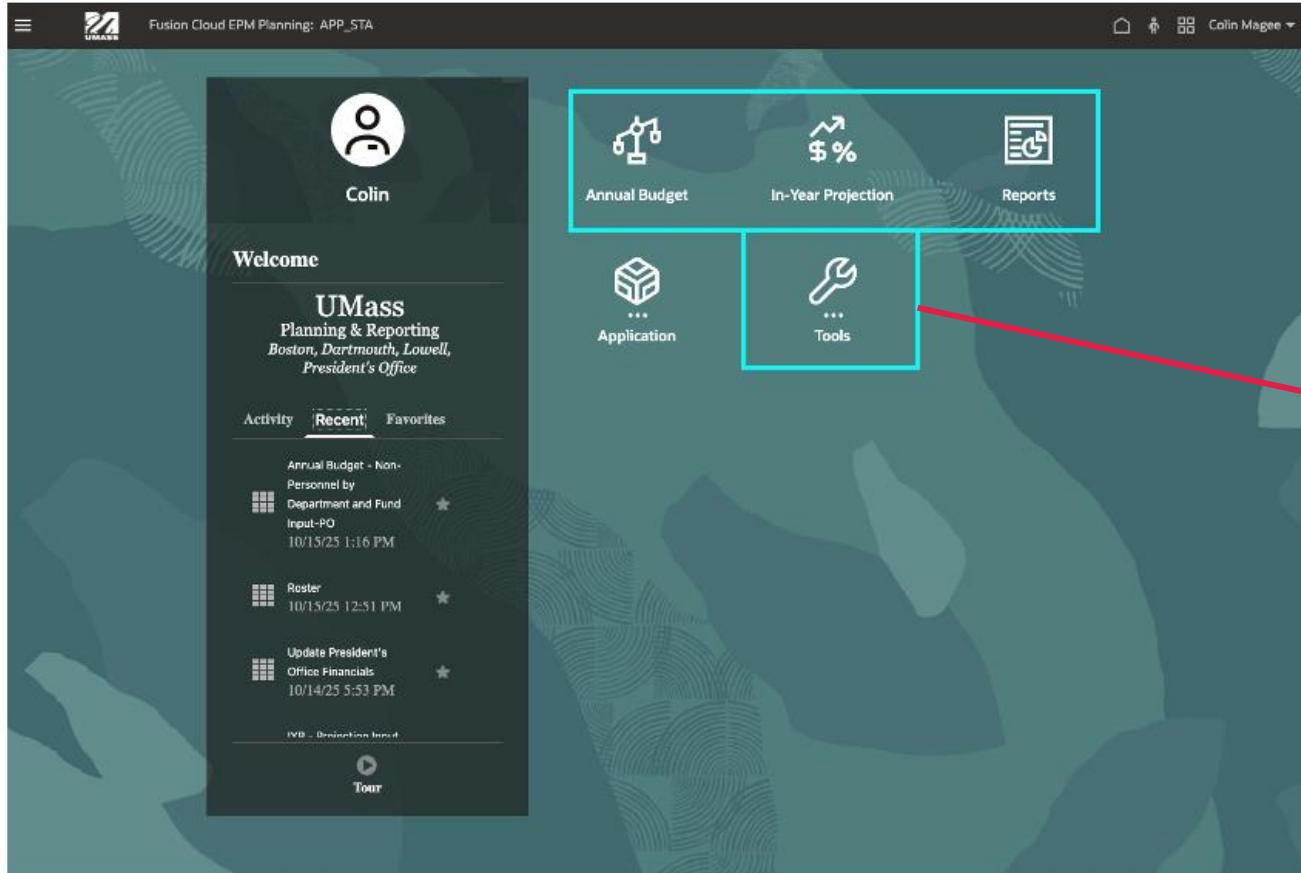
Recommended settings to update:

- **General:** Upload a profile image
- **Display:** Change language, time zone, and display of numbers
- **Notifications:** Add an email address and check the approvals box
- **User Variables:** Adjust settings that relate to affiliation with departments and other attributes
  - Budget Office will pre-populate user preference variables for each user.



# Oracle EPM: Navigating the Home Page – Tiles

Budget Planners will primarily navigate by using the set of tiles on the homepage

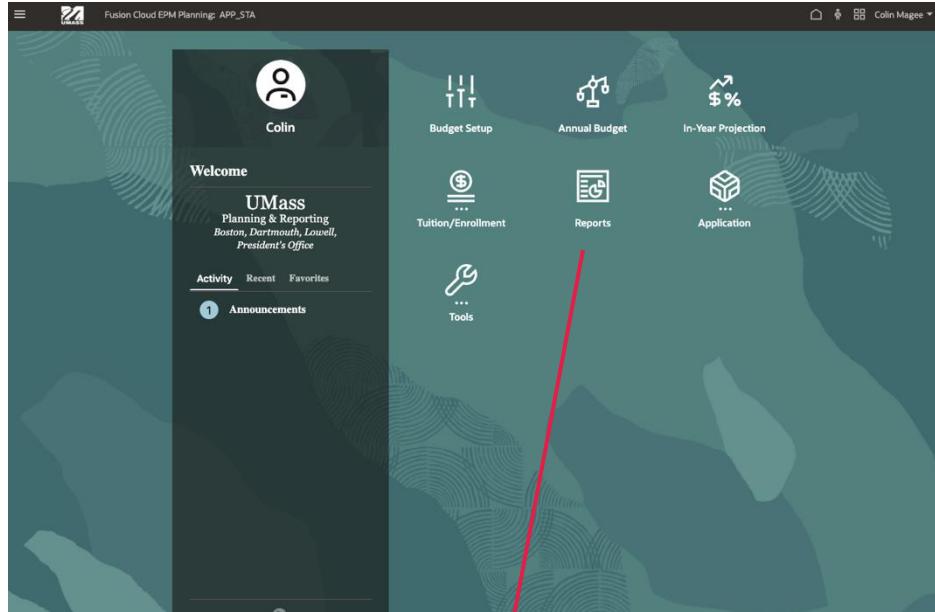


Budget Planners are likely to use the following cards:

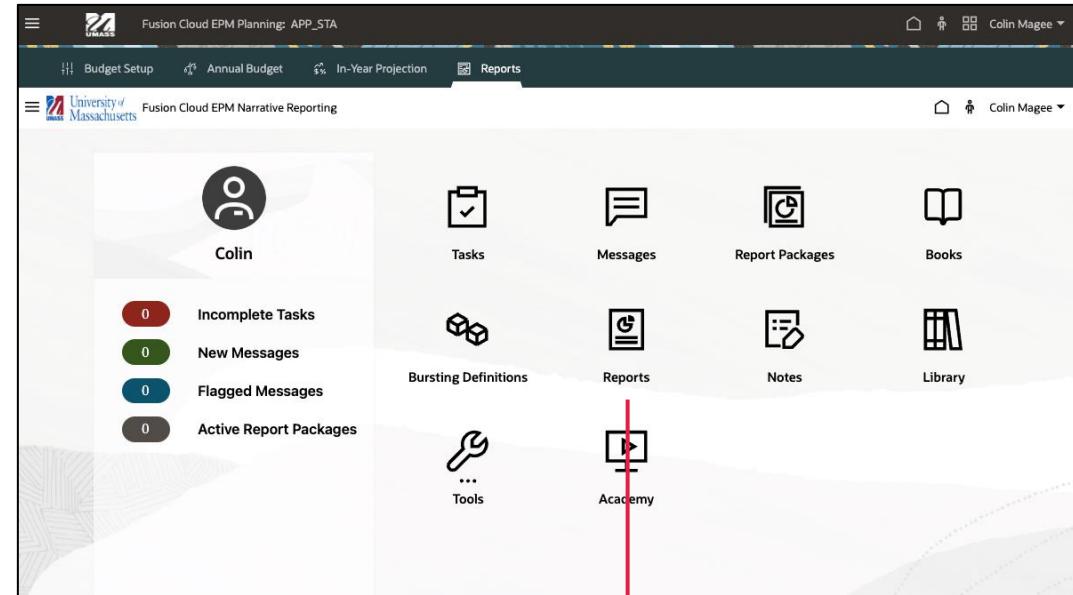
- Annual Budget
- In-Year Projection
- Reports
- Tools

# Accessing Reports

Budget Planners can access reports by clicking on the the Reports module, which will launch Narrative Reporting within Oracle EPM



1. Click on the Reports icon on the homepage

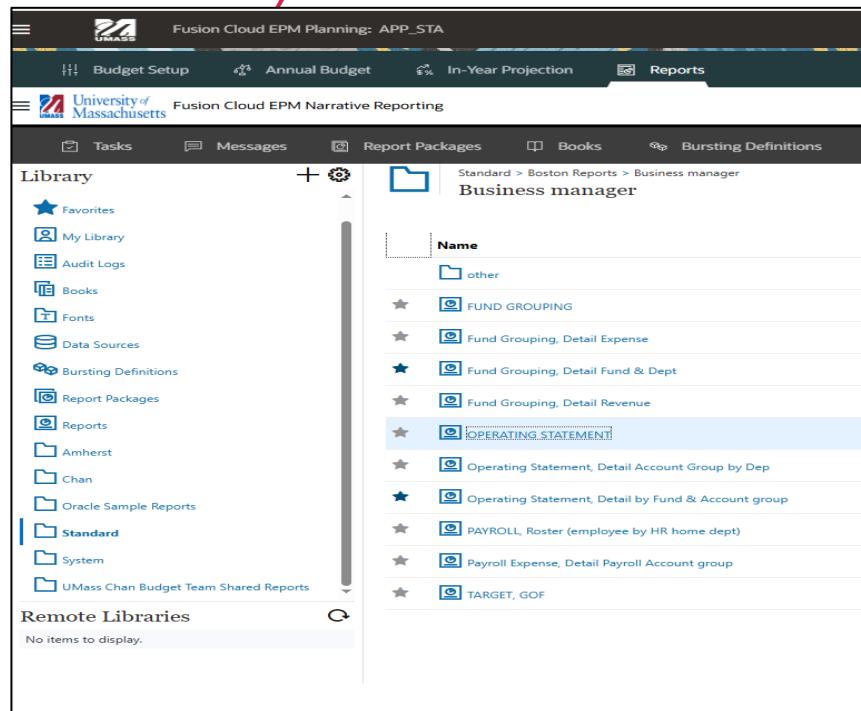


2. Click on Reports within the Narrative Reporting homepage

# Viewing Reports

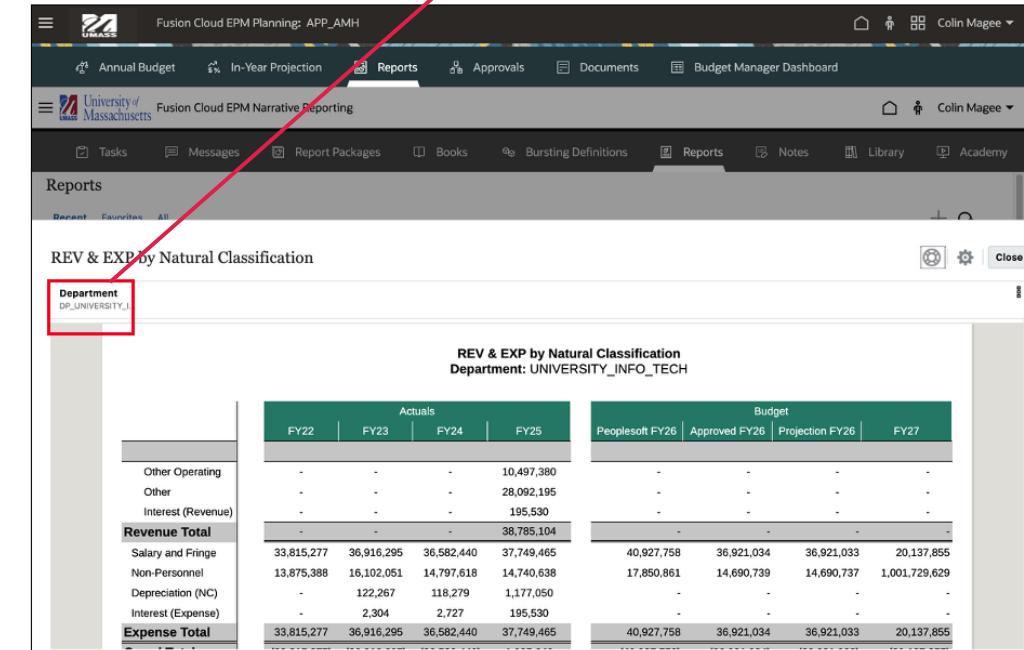
Users outside of Finance should use the **Business Manager** folder.

1. Select any single report to view the Report Details



The screenshot shows the 'Reports' section of the Fusion Cloud EPM Planning interface. The 'Business manager' folder is selected in the library. The 'Operating Statement' report is highlighted in the list.

2. Filter a report by selecting a different department from the selector

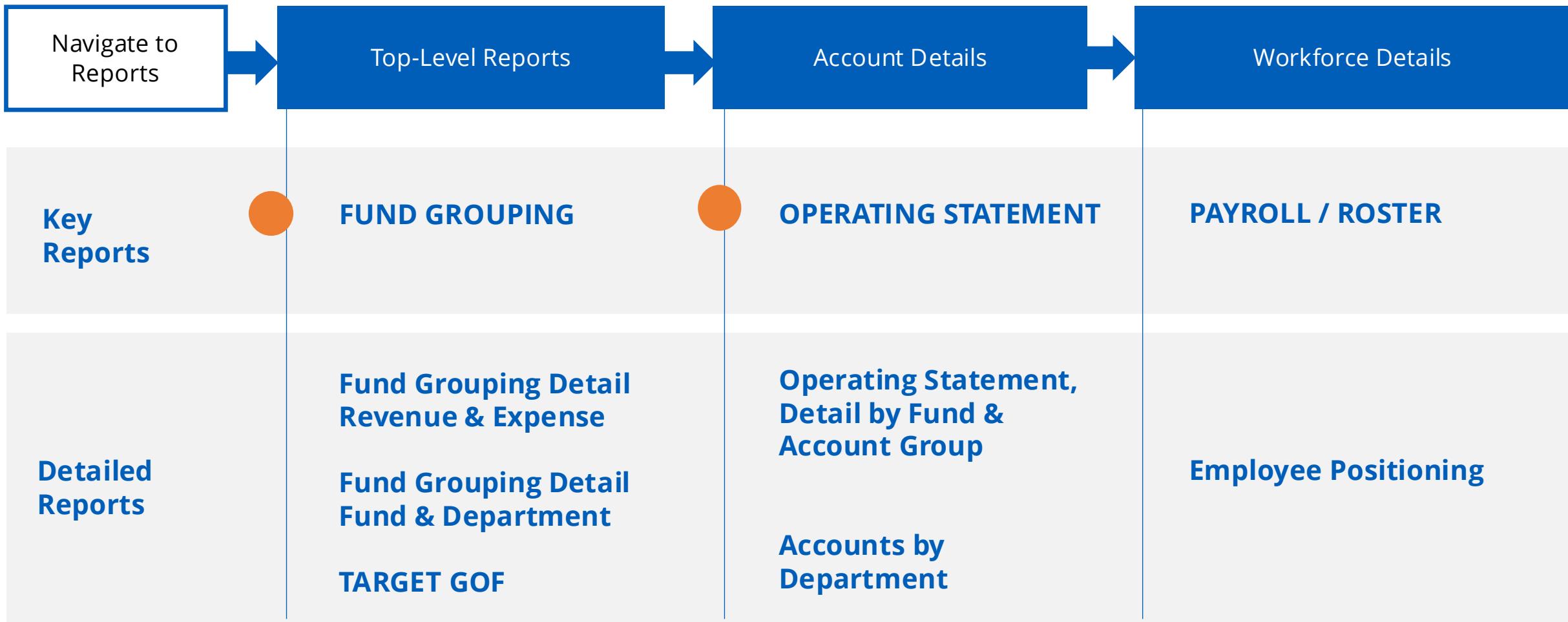


The screenshot shows the 'REV & EXP by Natural Classification' report for the 'UNIVERSITY\_INFO\_TECH' department. The 'Department' selector is highlighted with a red box. The report displays financial data for the selected department.

	Actuals	Budget						
	FY22	FY23	FY24	FY25	Peoplesoft FY26	Approved FY26	Projection FY26	FY27
Other Operating	-	-	-	10,497,380	-	-	-	-
Other	-	-	-	28,092,195	-	-	-	-
Interest (Revenue)	-	-	-	195,530	-	-	-	-
<b>Revenue Total</b>	-	-	-	38,785,104	-	-	-	-
Salary and Fringe	33,815,277	36,916,295	36,582,440	37,749,465	40,927,758	36,921,034	36,921,033	20,137,855
Non-Personnel	13,875,388	16,102,051	14,797,618	14,740,638	17,850,861	14,690,739	14,690,737	1,001,729,629
Depreciation (NC)	-	122,267	118,279	1,177,050	-	-	-	-
Interest (Expense)	-	2,304	2,727	195,530	-	-	-	-
<b>Expense Total</b>	33,815,277	36,916,295	36,582,440	37,749,465	40,927,758	36,921,034	36,921,033	20,137,855

# Annual Budget Process

# Key Reports to Review the Annual Budget



# Top-Level Reports: FUND GROUPING

This report summarizes activity across fund groups in the selected organization.

Upon opening report:

1. Use the department selector in the upper left to select department or summary.
2. Export report using the actions button in upper right
3. The fund groups are a newer element, allowing us to view all fund activity on one page
4. The underlying funds are detailed in the next set of reports.
  - The “GENERAL” Fund group includes GOF, General Operating Funds (includes NTT).

Fund Grouping						
Department: B900000000 - UMass Boston						
Funds	Accounts	Actual FY24	Actual FY25	Budget FY26	Budget FY27	VAR to Last Full Yr
GENERAL	All Revenues	486,771,533	511,772,943	492,036,897	163,702,995	(348,069,947)
GENERAL	All Expenses	506,545,784	521,436,741	440,098,332	379,305,050	(142,131,692)
OTHER_UNRESTR_UNIV	All Revenues	116,130,595	137,425,963	124,195,227	82,695,781	(54,730,182)
OTHER_UNRESTR_UNIV	All Expenses	66,460,828	97,542,787	84,074,590	21,138,785	(76,404,001)
RECOVERY_OF_IDC	All Revenues	13,241,732	18,722,755	12,705,507	18,718,034	(4,721)
RECOVERY_OF_IDC	All Expenses	23,479,844	28,256,457	17,467,296	18,829,014	(9,427,443)
UNREST_AUX_IBL	All Revenues	14,551,301	14,299,259	14,661,918	9,195,425	(5,103,834)
UNREST_AUX_IBL	All Expenses	14,331,700	27,948,169	14,583,431	32,087,914	4,139,745
UNRESTRICTED_FUNDS	All Revenues	630,695,162	682,220,919	643,599,549	274,312,236	(407,908,684)
UNRESTRICTED_FUNDS	All Expenses	610,818,155	675,184,154	556,223,649	451,360,763	(223,823,391)
GRANTS_UNIV	All Revenues	93,422,395	103,141,250	100,937,860	101,458,900	(1,682,350)
GRANTS_UNIV	All Expenses	82,569,899	90,744,322	100,929,147	104,798,511	14,054,190
OTHER_RESTRICTED	All Revenues	(68,858,437)	(62,711,358)	(67,570,265)	51,644,179	114,355,537
OTHER RESTRICTED	All Expenses	(67,179,665)	(63,280,099)	(83,527,570)	51,069,145	114,349,244



# Top-Level Reports: Fund Grouping, Detail (Exp & Revenue)

These two reports provide underlying funds within each group on the FUND GROUPING report. If you are unsure of the activity, you may go to summit and look up the detailed fund transactions

Fund Grouping, Detail Expense Department: B900000000 - UMass Boston					
Total Expense					
	Actual FY24	Actual FY25	Budget FY26	Budget FY27	VAR to Last Full Yr
<b>Funds</b>					
GENERAL	506,545,784	521,436,741	440,098,332	379,305,050	(142,131,692)
11001 - State Maintenance Non-AA	20,793,439	21,551,203	-	-	(21,551,203)
51029 - GOF - Payroll	23,396,911	24,284,425	34,742,183	52,210,635	27,926,210
51913 - Accrual State Appropriation	72,943,232	75,380,596	-	-	(75,380,596)
51006 - Tuition - Out of State	30,637,746	28,242,175	34,813,055	37,398,349	9,156,175
11000 - State Maintenance	113,282,346	119,325,938	180,950,186	203,345,370	84,019,432
51161 - General Operating Fund	241,509,076	248,745,985	184,641,296	81,675,764	(167,070,222)
51005 - Tuition - In State	3,983,034	3,906,419	4,951,612	4,674,932	768,513
OTHER_UNRESTR_UNIV	66,460,828	97,542,787	84,074,590	21,138,785	(76,404,001)
51373 - General Operations Fund - 2	968,300	676,030	315,257	675,489	(541)
51256 - Trust Fund Interest Fund	3,139,482	5,817,769	3,139,482	-	(5,817,769)
55900 - Accrual Loan	(309,480)	296,837	(309,480)	-	(296,837)
52142 - Administrative Allowance	212,250	244,528	213,461	244,602	73
51060 - Scholarship (Old)	128,404	213,337	128,404	213,337	0

Fund Grouping, Detail Revenue Department: B900000000 - UMass Boston					
Total Revenue					
	Actual FY24	Actual FY25	Budget FY26	Budget FY27	VAR to Last Full Yr
<b>Funds</b>					
GENERAL	486,771,533	511,772,943	492,036,897	163,702,995	(348,069,947)
11001 - State Maintenance Non-AA	20,793,439	21,551,203	20,793,439	-	(21,551,203)
51913 - Accrual State Appropriation	72,943,232	75,380,596	72,943,232	-	(75,380,596)
51006 - Tuition - Out of State	84,191,894	80,287,920	81,570,093	83,633,468	3,345,548
11000 - State Maintenance	113,282,346	119,325,938	126,732,411	-	(119,325,938)
51161 - General Operating Fund	58,835,207	75,383,687	47,126,302	9,696,700	(65,686,986)
51005 - Tuition - In State	136,725,416	139,843,599	142,871,421	70,372,827	(69,470,772)
OTHER_UNRESTR_UNIV	116,130,595	137,425,963	124,195,227	82,695,781	(54,730,182)
51373 - General Operations Fund - 2	232,500	1,370,274	50,000	1,370,274	0
51256 - Trust Fund Interest Fund	3,413,028	5,733,701	3,413,028	-	(5,733,701)
55900 - Accrual Loan	(1,689,808)	(18,045)	594,227	-	18,045
52142 - Administrative Allowance	186,863	196,871	186,863	196,871	0
51060 - Scholarship (Old)	136,940	246,078	130,135	246,078	0
51259 - Unrestricted	712,793	1,211,468	874,317	619,445	(592,023)

Note: These reports include accrual funds, which may not be available in Summit budget reports

# Top-Level Reports: Fund Grouping, Detail Fund & Dept

This report lists total revenue and total expense by fund and department. If you manage multiple departments this may be helpful if you are wondering what department may be driving fund activity

Fund Grouping, Detail Fund & Dept						
Department: B9000000000 - UMass Boston, all underlying departments			FY24 Actuals	FY25 Actuals	FY26 Budget	FY27 Budget
Expense Type	Fund	Department				Budget-last full year
Total Revenue	11000 - State Maintainance	B970001000 - Campus-Wide Admin	-	-	126,732,411	-
Total Revenue	11000 - State Maintainance	B999900000 - Accruals	113,282,346	119,325,938	-	(119,325,938)
Total Revenue	11001 - State Maintainance Non-AA	B970001000 - Campus-Wide Admin	-	-	20,793,439	-
Total Revenue	11001 - State Maintainance Non-AA	B999900000 - Accruals	20,793,439	21,551,203	-	(21,551,203)
Total Revenue	13013 - MODR	B017500000 - MA Ofc of Public Collaboration	2,971,551	3,300,511	3,213,465	3,300,511
Total Revenue	13019 - Collins Ctr Public Mgt	B016900000 - MGS-Collins Ctr for Public Mgt	247,735	247,650	247,735	247,650
Total Revenue	13036 - Asian American Studies	B013100000 - Asian American Institute	276,824	258,832	300,000	258,832
Total Revenue	13913 - Accrual State AP	B017500000 - MA Ofc of Public Collaboration	304,850	(223,600)	-	(223,600)
Total Revenue	13913 - Accrual State AP	B970001000 - Campus-Wide Admin	-	-	39,760	-
Total Revenue	17039 - UMass Facilities	B003300000 - Facilities Admin	(281,427)	5,827,396	(281,427)	5,827,396
Total Revenue	17042 - Deferred Maintenance Program	B003300000 - Facilities Admin	5,904,416	6,232,908	5,904,416	6,232,908
Total Revenue	17043 - Higher Education Cap Funding	B003300000 - Facilities Admin	201,015	-	201,015	-
Total Revenue	17050 - 7066-8110 Small Repairs	B003300000 - Facilities Admin	847,086	151,269	847,086	151,269
Total Revenue	17939 - Accrual State Plant AP	B003300000 - Facilities Admin	(2,958,716)	(5,827,396)	(2,958,716)	(5,827,396)
Total Revenue	17999 - Accrual Plant FYE	B970001000 - Campus-Wide Admin	-	-	2,648,309	-
Total Revenue	17000 - Accrual Plant FYE	B003300000 - Facilities Admin	2,648,309	0	-	0



# Top-Level Reports: TARGET GOF View

This report compares last year's base budget to this year's base budget.

- Targets will be sent through email
- We can use this report to check the email target against EPM entry
- Use this report to compare current year target to the prior year's target

GOF Target View						
Department: B901600000 - Campus Services						
Accounts	Actual FY24	Actual FY25	Allocated Budget Base FY26	Allocated Budget One- Time FY26	Budget FY27	VAR to LY BASE
Temp./Non-benefitted Payroll	241,909	258,108	242,140	-	270,762	28,622
Non-Regular Payroll	10,978	1,634	-	-	1,714	1,714
<b>Non-Payroll</b>	<b>87,909</b>	<b>118,843</b>	<b>155,006</b>	<b>-</b>	<b>124,670</b>	<b>(30,336)</b>
Travel & Conferences	6,913	8,560	18,500	-	8,980	(9,520)
Supplies & Services	29,076	36,630	22,299	-	38,426	16,127
Administrative Expenses	16,011	16,246	27,055	-	17,042	(10,013)
Purchased Services	734	297	0	-	312	312
Facility & Space Costs	1,226	12,454	19,155	-	13,064	(6,091)
Equipment Leased/Purch./Maint.	14,804	22,851	40,097	-	23,971	(16,126)
Recharge	19,145	21,806	27,900	-	22,875	(5,025)
<b>Total Targeted Non-Salary</b>	<b>340,796</b>	<b>378,586</b>	<b>397,146</b>	<b>-</b>	<b>397,146</b>	<b>0</b>

# ● Account Details: OPERATING STATEMENT

This provides a detailed view of financials at the department level and fund group, similar to Summit and UMplan.

Upon opening:

1. Select parameters in upper left, Department & Fund Group
2. Review trends on screen or export to excel for analysis
3. The General funds group of this at the highest organizational rollup for your area will be included in the budget deck. We may include supplemental P&Ls in appendices for more complicated areas.

Accounts	Actual FY24	Actual FY25	Budget FY26	Budget FY27	FY27Bud vs FY26Act	\$	%
All Revenues	486,771,533	511,772,943	492,036,897	163,702,995	(348,069,947)		-68%
All Expenses	506,545,784	521,436,741	440,098,332	379,305,050	(142,131,692)		-27%
Payroll & Fringes	277,017,461	287,032,533	290,539,798	308,175,532	21,142,999		7%
Payroll	171,197,193	177,340,059	183,467,013	195,989,551	18,649,492		11%
Grad Student Payroll	9,428,745	10,125,343	9,504,642	12,520,686	2,395,343		24%
Fringe Benefits	80,078,119	82,169,566	85,630,643	84,416,128	2,246,563		3%
Temp./Non-benefitted Payroll	9,271,184	10,047,240	7,297,373	9,739,995	(307,245)		-3%
Non-Regular Payroll	7,042,221	7,350,326	4,640,127	5,509,172	(1,841,154)		-25%
Non-Payroll	143,372,145	145,326,997	147,271,756	61,232,545	(84,094,452)		-58%
Student Aid	74,019,907	71,558,493	73,726,024	2,417,055	(69,141,438)		-97%
Travel & Conferences	2,235,745	2,380,855	2,775,945	2,666,062	285,208		12%
Supplies & Services	9,977,138	10,886,656	9,825,486	10,789,106	(97,550)		-1%
Administrative Expenses	5,420,811	6,203,366	8,252,175	6,247,265	43,898		1%
Consulting Services	8,198,687	7,360,262	8,485,762	6,397,348	(962,915)		-13%
Purchased Services	5,971,438	6,410,970	5,358,547	6,473,413	62,442		1%
Facility & Space Costs	2,463,034	2,821,356	1,722,695	2,365,937	(455,419)		-16%
Utilities	9,236,028	11,032,852	10,587,080	10,587,000	(445,852)		-4%
Equipment Leased/Purch./Maint.	1,291,401	1,455,114	1,494,891	1,522,906	67,792		5%
Infrastructure & Land	7,493,306	6,842,787	6,834,944	6,317,383	(525,404)		-8%
Other	1,651,729	1,642,010	1,699,788	622,705	(1,019,305)		-62%
Recharge	1,659,547	1,711,331	1,548,843	1,412,035	(299,296)		-17%



# Account Details: Operating Statement, Detail by Fund & Account Group

This provides a detailed view of financials for each department by fund and major expense.

Upon opening this report

1. Select Department or rollup to view
2. More complicated areas can export and use this report to review any trend issues on the P&L

Expenses by Department						
Department: B006800000 - Graduate Studies						
Department	Fund	Expense Type	FY24 Actuals	FY25 Actuals	FY26 Budget	FY27 Budget
B005200007 - Graduate Health Insurance	51161 - General Operating Fund	Fringe Benefits	2	-	-	-
B005200007 - Graduate Health Insurance	51161 - General Operating Fund	Non-Regular Payroll	98	-	-	-
B005200007 - Graduate Health Insurance	51161 - General Operating Fund	Non-Payroll	1,059,610	1,116,629	-	(1,116,629)
B005200007 - Graduate Health Insurance	51900 - General Accruals	Non-Payroll	(1,059,610)	(1,116,629)	-	1,116,629
Total Expense for B005200007 - Graduate Health Insurance			100	0	-	0
B005200000 - Graduate Studies	11000 - State Maintainance	Payroll	64,473	-	259,109	259,109
B005200000 - Graduate Studies	11000 - State Maintainance	Fringe Benefits	-	-	103,747	103,747
B005200000 - Graduate Studies	51006 - Tuition - Out of State	Payroll	838,462	811,965	540,573	989,074
B005200000 - Graduate Studies	51006 - Tuition - Out of State	Fringe Benefits	19,879	14,561	250,448	396,025
B005200000 - Graduate Studies	51161 - General Operating Fund	Grad Student Payroll	-	14,679	-	9,856,048
B005200000 - Graduate Studies	51161 - General Operating Fund	Fringe Benefits	2,331	3,168	2,704	2,674
B005200000 - Graduate Studies	51161 - General Operating Fund	Temp./Non-benefitted Payroll	133,952	268,442	80,900	362,184
B005200000 - Graduate Studies	51161 - General Operating Fund	Non-Regular Payroll	11,640	6,834	12,330	9,221
B005200000 - Graduate Studies	51161 - General Operating Fund	Non-Payroll	94,021	104,388	1,412,154	1,680,461
B005200000 - Graduate Studies	51373 - General Operations Fund - 2	Non-Payroll	26,746	21,640	-	43,280
B005200000 - Graduate Studies	51900 - General Accruals	Grad Student Payroll	-	0	1,527,865	1,527,865

# Account Details: **Accounts by Dept**

For Managers with multiple departments, this report provides spending across departments for a selected account group. If you just want to view what is driving growth in the “Utilities” line you can open this and select that account to identify underlying departments.

Upon opening this report

1. In top left hand corner select the account group and Fund group you are researching
2. You can export and analyze in excel or review on screen.

		FY24 Spending	FY25 Spending	FY26Bud	FY27Bud	FY27B VS FY25A
B013300000 - Trotter Institute	-	89	0	0	(89)	
B009000000 - Nantucket Field Station	15,797	10,363	17,000	17,000	6,637	
B003300000 - Facilities Admin	336,594	203,785	10,570,080	10,570,000	10,366,215	
B003300006 - Facilities Utilities	8,883,637	10,818,616	-	-	(10,818,616)	
<b>Total</b>	<b>9,236,028</b>	<b>11,032,852</b>	<b>10,587,080</b>	<b>10,587,000</b>	<b>(445,852)</b>	

# Workforce Details: PAYROLL & ROSTER

This is a detailed listing of individual positions and employees by home department, title, FTE, salary, and other HR/budget alignment data.

Upon opening this report:

1. Verify that all employees belong here  
– consider recent changes like transfers, repurposed positions etc.
2. Make sure vacant positions make sense, is there intent to hire.

Roster Report					
Home/Department	B019400 Honor College Dean's Office	Position FTE	Job Code or Title	UM Tenure Status	Total Compensation
<b>Faculty   B019400 - Honors College - Dean's Office</b>					
Employee Name - Emplid	Associate Professor - 00028593	1.0	90028 - Associate Professor	Tenure	153,595
<b>Total Faculty</b>		<b>1.0</b>			<b>153,595</b>
 <b>Staff   B019400 - Honors College - Dean's Office</b>					
Employee Name - Emplid	ProgMgr & SciStuCareerMentSpec - 00030511	1.0	BCS029 - ProgMgr & SciStuCareerMentSpec	-	101,586
Employee Name - Emplid	Asst Dean for Budget & Admin - 00019338	1.0	BC5373 - Asst Dean for Budget & Admin	-	101,077
Employee Name - Emplid	Program & Advising Coordinator - 00015455	1.0	BC1596 - Program & Advising Coordinator	-	88,338
Employee Name - Emplid	Professor A & Interim Dean - 00009161	1.0	BC1719 - Dean, Honors College	Tenure	176,089
Vacant Employee	Dir of Curriculum & STEM Engmt - 00017788	1.0	BC6975 - Director	-	151,669
Vacant Employee	Outreach & Stu Success Coor - 00031010	1.0	BCC067 - Coordinator	-	30,115
<b>Total Staff</b>		<b>6.0</b>			<b>648,874</b>
 <b>Personnel Total</b>					
		<b>7.0</b>			<b>802,469</b>

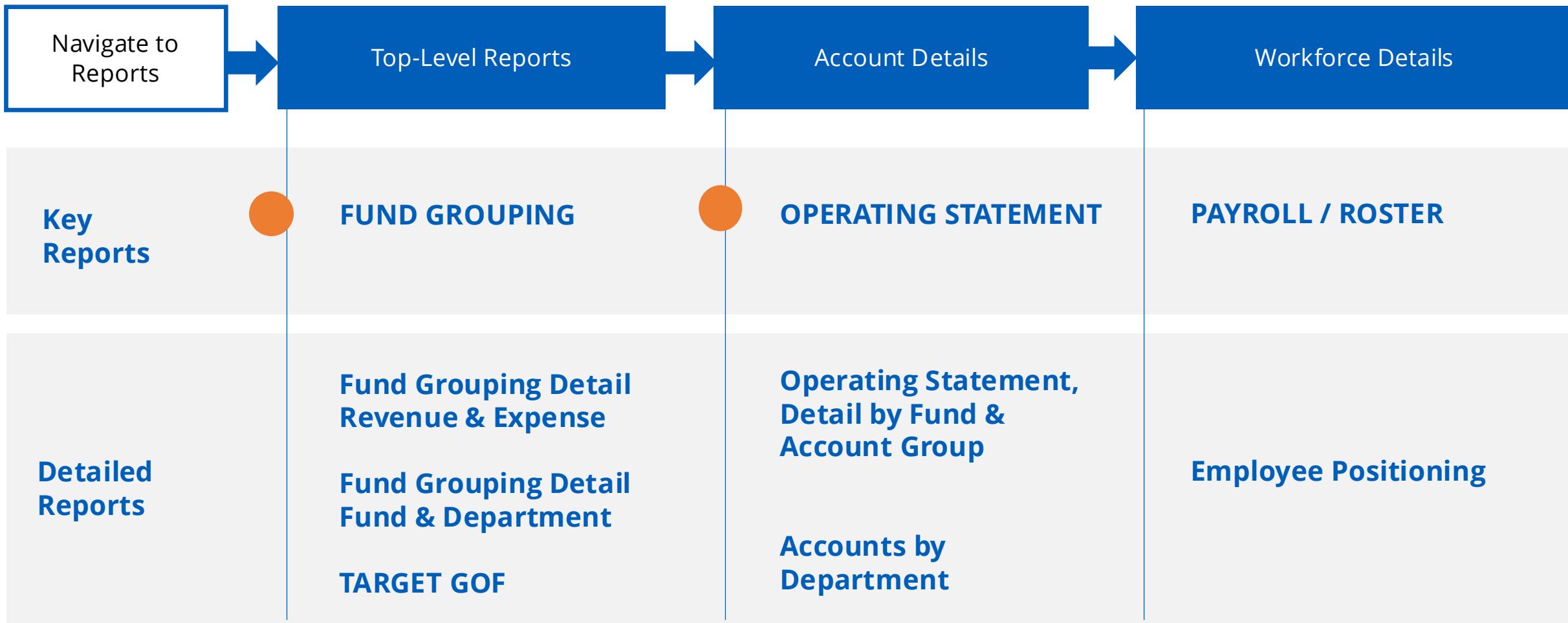
# Workforce Details: Employee Positioning

This report provides full expense details that will support the budget on the payroll line

1. Employees expensed outside their home department are allocated to expense departments on this report.
2. The salaries shown here include the impact of payrate increases.
3. Fringe assumptions and Vacancy assumptions are applied.
4. The column “Payroll Net Vacancy” will tie to the budgeted payroll for all funds in your area.

Employee Position Budget Report												
Fund	Employee	Position	Union Code	Job Code or Title	FT/PT	Regular / Temp	Standard Hours	Grade	Step	Total Salary	Total Fringe	Total Compensation
11000 - State Maintenance	Employee name - ID	Associate Professor - 00028593	B40 - MSP/FSU Faculty & Librarian	90028 - Associate Professor	F	R	40	-	0	153,595	61,500	215,095
11000 - State Maintenance	Employee name - ID	ProgMgr & SciStuCareerMentSpec-00030511	B42 - MTANEA Professional Staff	BCS029 - ProgMgr & SciStuCareerMentSpec	F	R	38	32	0	86,065	34,460	120,526
11000 - State Maintenance	Employee name - ID	Asst Dean for Budget & Admin - 00019338	B43 - Non-Unit Professional	BC5373 - Asst Dean for Budget & Admin	F	R	40	-	0	101,077	40,471	141,548
11000 - State Maintenance	Employee name - ID	Program & Advising Coordinator - 00015455	B42 - MTANEA Professional Staff	BC1596 - Program & Advising Coordinator	F	R	38	31	0	88,338	35,371	123,709
11000 - State Maintenance	Employee name - ID	Professor A & Interim Dean - 00009161	B43 - Non-Unit Professional	BC1719 - Dean, Honors College	F	R	40	5	0	176,089	70,506	246,595
11000 - State Maintenance	Employee name - ID	Dir of Curriculum & STEM Engmt-00017788	No Union	BC6975 - Director	F	R	38	34	0	151,669	60,728	212,397
11000 - State Maintenance	Employee name - ID	Outreach & Stu Success Coor - 00031010	No Union	BCC067 - Coordinator	F	R	38	31	0	30,115	12,058	42,173
51029 - GOF - Payroll	Employee name - ID	Senior Lecturer III - 00004021	B40 - MSP/FSU Faculty & Librarian	90261 - Senior Lecturer III	F	R	40	1	0	25,127	10,061	35,188
51029 - GOF - Payroll	Employee name - ID	Senior Lecturer III - 00019158	B40 - MSP/FSU Faculty & Librarian	90261 - Senior Lecturer III	F	R	40	1	0	25,073	10,039	35,112
51029 - GOF - Payroll	Employee name - ID	Senior Lecturer III - 00023518	B40 - MSP/FSU Faculty & Librarian	90261 - Senior Lecturer III	F	R	40	1	0	27,978	11,203	39,181
										865,126	346,397	1,211,523

# Key Reports to Review the Annual Budget



# Support Resources

# Support Resources



## Resources

A recording of this training will be available on the budget office website, along with a how-to guide.

[Budget Office Website](#)

[Training Presentation/ Job Aid](#)



## Support

The Budget Office is here for you throughout the budget process

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