Permanent Budget Summary by Org-Fund

Description:

A set of permanent budget summaries sorted by Org-Fund and Account/Budget Pool (no Activity Code) and Org hierarchy levels.

Report Tabs/Views:

- Org-Fund by Acct Pool Matrix
- · Org-Fund with Staffing Detail
- Org Lvl 3 and 4 by Acct Pool Matrix
- · Org Lvl 2 and 3 by Acct Pool Matrix

Data Prompts:

- · Org Code at any hierarchical level: type in one or more values, or type a 1 to return all values
- 4 digit Permanent Budget Year

Report Limitations:

- Includes
 - Permanent Budget amounts from the FMW system
 - Staffing details for filled positions and open provisions
- Excludes
 - Funds that do not have Permanent Budgets
 - FTE amounts that are Zero

Customizations:

- · The Account Pool Titles have been renamed for readability.
- In the Staffing details section, for filled positions the employee name is displayed, for open provisions
 the provision description is displayed.
- A custom variable exists that splits the FTE figures between Academic and Staff. This custom variable determines that split based on whether the Account Code Pool is B00000 (Academic) or B01000 (Staff).
- · Any difference between Budgeted FTE and Staffing FTE totals appear as the Variance FTE.
- Any difference between the Budgeted Salary and Staffing Salary totals appear as the Variance Amount.

Cautions:

- The year prompt is the "Permanent Budget Year" not the "Fiscal Year".
- The report contains two Queries, one for Permanent Budget data and one for Staffing Details data. It
 is important to edit any similar conditions in both Queries uniformly.
- Amounts are not displayed at the Activity Code level.



This report has passed the UCSC Data Warehouse's Report Certification Process (see http://planning.ucsc.edu/DataMgmt/dwh/bob/corp_docs.htm). Any user customizations that change the dynamics, functionality or purpose of the report negate the certification status. In such event, please remove all marks of certification from each report tab.

Title: Permanent Budget by Org-Fund

Tab: Purpose Version 3.2

Permanent Budget Summary by Account Pool

04/02/09

Permanent Budget Year: 2007

Org and Org Title		Acad	Staff	Acad Salaries	Staff Salaries	Gen Asst Salaries	Supplies & Expense	Inventorial	Unallocated	Total
Fund and Fund Title		FTE	FTE	B00000	B01000	B02000	B03000	B04000	B08000	
123XX Org Title										
18XXX Fund Title								1,200		1,200
19XXX Fund Title		0.00	2.25	15,541	61,509	1,343	4,983		1,040	84,416
	Total Org Budget	0.00	2.25	15,541	61,509	1,343	4,983	1,200	1,040	85,616
123XX Org Title										
18XXX Fund Title								1,200		1,200
19XXX Fund Title		0.00	3.25	15,541	81,459	3,019	5,152		1,040	106,211
	Total Org Budget	0.00	3.25	15,541	81,459	3,019	5,152	1,200	1,040	107,411
123XX Org Title										
19XXX Fund Title							1,500			1,500
	Total Org Budget						1,500			1,500
123XX Org Title										
19XXX Fund Title		1.00		97,440			3,805	360		101,605
	Total Org Budget	1.00		97,440			3,805	360		101,605
123XX Org Title										
19XXX Fund Title									16,620	16,620
	Total Org Budget								16,620	16,620
123XX Org Title										
19XXX Fund Title		17.00	4.42	904,680	106,808					1,011,488
	Total Org Budget	17.00	4.42	904,680	106,808					1,011,488
123XX Org Title										
19XXX Fund Title							24,960			24,960
	Total Org Budget						24,960			24,960

Title: Permanent Budget by Org-Fund

Tab: Org-Fund by Acct Pool Matrix

Version 3.2

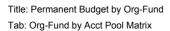


Permanent Budget Summary by Account Pool

04/02/09

Permanent Budget Year: 2007

Org and Org Title Fund and Fund Title		Acad FTE	Staff FTE	Acad Salaries B00000	Staff Salaries B01000	Gen Asst Salaries B02000	Supplies & Expense	Inventorial B04000	Unallocated B08000	Total
123XX Org Title										
34XXX Fund Title							828			828
	Total Org Budget						828			828
123XX Org Title										
19XXX Fund Title		23.00	5.96	1,395,991	147,298					1,543,289
	Total Org Budget	23.00	5.96	1,395,991	147,298					1,543,289
	Grand Total Budget	41.00	15.88	2,429,194	397,073	4,361	41,228	2,760	18,700	2,893,316







77,050

2.25

84,416

Permanent Budget Summary with Staffing Detail

Permanent Budget Year: 2007

Permanent Budget Year: 2007								
OrgCode-Fund Code	Org Title - Fund Title							Variance
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Amt
Employee Name or Provision Desc	Job Title	PSS	0	9,239				
Employee Name or Provision Desc	Job Title	PSS	0	2,520				
Employee Name or Provision Desc	Job Title	PSS	0	1,492				
Employee Name or Provision Desc	Job Title	PSS	0	2,290				
Employee Name or Provision Desc								
	B00000 Acad Salaries		0	15,541	0	15,541	0	0
Employee Name or Provision Desc	Job Title	PSS	0.05	632				
Employee Name or Provision Desc	Job Title	PSS I	0.2	6,679				
Employee Name or Provision Desc	Job Title	PSS 1.0	0.5	8,935				
Employee Name or Provision Desc	Job Title	PSS H	1	26,446				
Employee Name or Provision Desc	Job Title	PSS I	0.5	18,817				
Employee Name or Provision Desc								
	B01000 Staff Salaries		2.25	61,509	2.25	61,509	0	0
	B02000 Gen Asst Salaries					1,343		
	B03000 Supplies & Expense					4,983		
	DOOOOO Supplies a Expelise					4,903		
	B08000 Unallocated					1,040		
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Title: Permanent Budget by Org-Fund Tab: Org-Fund with Staffing Detail

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Totals



0

04/02/09

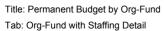
Permanent Budget Summary	with Staffing Detail							04/02/09
Permanent Budget Year: 200	07							
OrgCode-Fund Code	Org Title - Fund Title							Variance
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Amt
	B04000 Inventorial					1,200	ı	
Totals						1,200	<u> </u>	



Permanent Budget Summary with Staffing Detail 04/02/09

Permanent Budget Year: 2007

OrgCode-Fund Code	Org Title - Fund Title							Variance
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Amt
Employee Name or Provision Desc	Job Title	PSS	0	9,239				
Employee Name or Provision Desc	Job Title	PSS	0	2,520				
Employee Name or Provision Desc	Job Title	PSS	0	1,492				
Employee Name or Provision Desc	Job Title	PSS	0	2,290				
Employee Name or Provision Desc								
	B00000 Acad Salaries		0	15,541	0	15,541	0	0
Employee Name or Provision Desc	Job Title	PSS H	1	22,349				
Employee Name or Provision Desc	Job Title	PSS K	0.25	9,621				
Employee Name or Provision Desc	Job Title	PSS H	1	21,737				
Employee Name or Provision Desc	Job Title	PSS 1.0	0.5	8,935				
Employee Name or Provision Desc	Job Title	PSS I	0.5	18,817				
Employee Name or Provision Desc								
	B01000 Staff Salaries		3.25	81,459	3.25	81,459	0	0
	B02000 Gen Asst Salaries					3,019		
	B03000 Supplies & Expense					5,152		
	B08000 Unallocated					1,040		
Totals				97,000	3.25	106,211	0	0



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Permanent Budget Summary	with Staffing Detail							04/02/09
Permanent Budget Year: 200	7							
OrgCode-Fund Code	Org Title - Fund Title							Variance
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Amt
	B03000 Supplies & Expense					1,500)	
Totals						1,500	1	



97,440

1

101,605

0

0

Permanent Budget Summary with Staffing Detail 04/02/09 Permanent Budget Year: 2007 **OrgCode-Fund Code Org Title - Fund Title** Variance FTE Staffing Cost Perm FTE Perm Budget FTE Var **Staffing Desc** Title Grade Amt Employee Name or Provision Desc Job Title SMG 97,440 1 Employee Name or Provision Desc B00000 Acad Salaries 97,440 1 1 97,440 0 0 B03000 Supplies & Expense 3,805 360 B04000 Inventorial



Totals

Permanent Budget Summary	with Staffing Detail							04/02/09
Permanent Budget Year: 200	07							
OrgCode-Fund Code	Org Title - Fund Title							Variance
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Amt
	B08000 Unallocated					16,620)	
 Totals						16,620	1	



Permanent Budget Summary with Staffing Detail

Permanent Budget Year: 2007

OrgCode-Fund Code	Org Title - Fund Title							
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Variance Amt
Employee Name or Provision Desc	Job Title	PSS	0			_		
Employee Name or Provision Desc	Job Title	Academic	1					
Employee Name or Provision Desc	Job Title	Academic	1	70,920				
Employee Name or Provision Desc	Job Title	Academic	1	34,680				
Employee Name or Provision Desc	Job Title	Academic	1	45,540				
Employee Name or Provision Desc	Job Title	Academic	1	36,000				
Employee Name or Provision Desc	Job Title	Academic	1	48,060				
Employee Name or Provision Desc	Job Title	Academic	1	62,520				
Employee Name or Provision Desc	Job Title	Academic	1	49,680				
Employee Name or Provision Desc	Job Title	Academic	1	72,780				
Employee Name or Provision Desc	Job Title	Academic	1	47,460				
Employee Name or Provision Desc	Job Title	Academic	1	36,000				
Employee Name or Provision Desc	Job Title	Academic	1	50,220				
Employee Name or Provision Desc	Job Title	Academic	1	58,320				
Employee Name or Provision Desc	Job Title	Academic	1	50,520				
Employee Name or Provision Desc	Job Title	Academic	1	57,900				
Employee Name or Provision Desc	Job Title	Academic	1	67,140				
Employee Name or Provision Desc	Job Title	Academic	1	78,540				
Employee Name or Provision Desc								
	B00000 Acad Salaries		17	904,680	17	904,680	0	0
Employee Name or Provision Desc	Job Title	PSS 4.5	1	25,906				
Employee Name or Provision Desc	Job Title	PSS 1.0	0.42	7,505				
Employee Name or Provision Desc	Job Title	PSS 1.0	1	20,650				

Title: Permanent Budget by Org-Fund

Tab: Org-Fund with Staffing Detail

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Permanent Budget Summary with	Staffing Detail							04/02/09
Permanent Budget Year: 2007								
OrgCode-Fund Code	Org Title - Fund Title							Variance
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Amt
Employee Name or Provision Desc	Job Title	PSS 1.0	1	20,650				
Employee Name or Provision Desc	Job Title	PSS J	1	32,098				
Employee Name or Provision Desc								
	B01000 Staff Salaries		4.42	106,808	4.42	106,808	0	0
Totals				1,011,488	21.42	1,011,488	0	0



Permanent Budget Summary	with Staffing Detail							04/02/09
Permanent Budget Year: 20	07							
OrgCode-Fund Code	Org Title - Fund Title							Variance
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Amt
	B03000 Supplies & Expense					24,960)	
Totals						24,960)	



Permanent Budget Summary with	Staffing Detail							04/02/09
Permanent Budget Year: 2007								
OrgCode-Fund Code	Org Title - Fund Title							Variance
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Amt
	B03000 Supplies & Expense					828	3	
Totals						828	5	



Permanent Budget Summary with Staffing Detail

Permanent Budget Year: 2007

OrgCode-Fund Code	Org Title - Fund Title							
Staffing Desc	Title	Grade	ETE	Staffing Cost	Porm ETE	Perm Budget	ETE Vor	Variance Amt
Employee Name or Provision Desc	Job Title	PSS	0	_		reilli Buuget	FIE Vai	AIIIL
• •								
Employee Name or Provision Desc	Job Title	Academic	1	•				
Employee Name or Provision Desc	Job Title	Academic	1	-,				
Employee Name or Provision Desc	Job Title	Academic	1					
Employee Name or Provision Desc	Job Title	Academic	1	46,080				
Employee Name or Provision Desc	Job Title	Academic	1	87,000				
Employee Name or Provision Desc	Job Title	Academic	1	40,740				
Employee Name or Provision Desc	Job Title	Academic	1	58,380				
Employee Name or Provision Desc	Job Title	Academic	1	84,900				
Employee Name or Provision Desc	Job Title	Academic	1	58,680				
Employee Name or Provision Desc	Job Title	Academic	1	47,280				
Employee Name or Provision Desc	Job Title	Academic	1	76,380				
Employee Name or Provision Desc	Job Title	Academic	1	56,700				
Employee Name or Provision Desc	Job Title	Academic	1	78,180				
Employee Name or Provision Desc	Job Title	Academic	1	56,820				
Employee Name or Provision Desc	Job Title	Academic	1	48,600				
Employee Name or Provision Desc	Job Title	Academic	1	52,200				
Employee Name or Provision Desc	Job Title	Academic	1	49,800				
Employee Name or Provision Desc	Job Title	Academic	1	44,400				
Employee Name or Provision Desc	Job Title	Academic	1	41,551				
Employee Name or Provision Desc	Job Title	Academic	1	75,300				
Employee Name or Provision Desc	Job Title	Academic	1	84,420				
Employee Name or Provision Desc	Job Title	Academic	1	48,000				
Employee Name or Provision Desc	Job Title	Academic	1	44,340				

Title: Permanent Budget by Org-Fund

Tab: Org-Fund with Staffing Detail

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Permanent Budget Summary with Staffing Detail 04/02/09

Permanent Budget Year: 2007

OrgCode-Fund Code	Org Title - Fund Title							Variance
Staffing Desc	Title	Grade	FTE	Staffing Cost	Perm FTE	Perm Budget	FTE Var	Amt
Employee Name or Provision Desc								
	B00000 Acad Salaries		23	1,395,991	23	1,395,991	0	0
Employee Name or Provision Desc	Job Title	PSS 0.0	0.5	12,132				
Employee Name or Provision Desc	Job Title	PSS K	1	36,000				
Employee Name or Provision Desc	Job Title	PSS H	1	26,633				
Employee Name or Provision Desc	Job Title	PSS H	0.46	12,089				
Employee Name or Provision Desc	Job Title	PSS 1.5	1	21,132				
Employee Name or Provision Desc	Job Title	PSS 2.0	1	18,662				
Employee Name or Provision Desc	Job Title	PSS 1.0	1	20,650				
Employee Name or Provision Desc								
	B01000 Staff Salaries		5.96	147,298	5.96	147,298	0	0
Totals				1,543,289	28.96	1,543,289	0	0

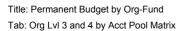


Permanent Budget Summary by Account Pool

Permanent Budget Year: 2007

04/02/09

Org and Org Title		Acad	Staff	Acad Salaries	Staff Salaries	Gen Asst Salaries	Supplies & Expense	Inventorial	Unallocated	Total
Fund and Fund Title		FTE	FTE	B00000	B01000	B02000	B03000	B04000	B08000	
XXX Org Level 3										
XXXX Org Level 4		1.00		97,440			3,805	360	16,620	118,225
XXXX Org Level 4		17.00	4.42	904,680	106,808		25,788			1,037,276
XXXX Org Level 4		23.00	5.96	1,395,991	147,298					1,543,289
XXXX Org Level 4							1,500			1,500
XXXX Org Level 4		0.00	2.25	15,541	61,509	1,343	4,983	1,200	1,040	85,616
XXXX Org Level 4		0.00	3.25	15,541	81,459	3,019	5,152	1,200	1,040	107,411
	Total Org Lvl 3 Budget	41.00	15.88	2,429,194	397,073	4,361	41,228	2,760	18,700	2,893,316
	Grand Total Budget	41.00	15.88	2,429,194	397,073	4,361	41,228	2,760	18,700	2,893,316



Version 3.2



Permanent Budget Summary by Account Pool

04/02/09

Permanent Budget Year: 2007

Org and Org Title		Acad Staff		Acad Salaries	Staff Salaries	Gen Asst Salaries	Supplies & Expense	Inventorial	Unallocated	Total
Fund and Fund Title		FTE	FTE	B00000	B01000	B02000	B03000	B04000	B08000	
XX Org Level 3										
XXX Org Level 3		41.00	15.88	2,429,194	397,073	4,361	41,228	2,760	18,700	2,893,316
	Total Org Lvl 3 Budget	41.00	15.88	2,429,194	397,073	4,361	41,228	2,760	18,700	2,893,316
	Grand Total Budget	41.00	15.88	2,429,194	397,073	4,361	41,228	2,760	18,700	2,893,316

