Table of Contents

Budget Mart Web Introduction................................................................. 3

Budget Mart Web Shared Forms............................................................... 4
  General Instructions ........................................................................... 4
  Basic Form Use ................................................................................ 4
  Restrictions and Errors ....................................................................... 5
Modify/View Parameters Tables Menu..................................................... 9
Projection Parameter Information............................................................ 10
Unclassified Salary Adjustment List ...................................................... 12
Unclassified Salary Adjustment Mass Add/Update ..................................... 13
Unclassified Salary Adjustment Edit ..................................................... 14
Future Position List .............................................................................. 15
Future Position Add ............................................................................ 16
Future Position Edit ............................................................................ 18
Vacant Position List ............................................................................ 19
Vacant Position Add ........................................................................... 20
Vacant Position Edit ........................................................................... 22
Choose BI View ................................................................................. 23

Budget Mart Web Administration Forms ............................................... 24
  Classified Increase List ....................................................................... 24
  Classified Increase Add ...................................................................... 25
  Classified Increase (IT %) Add .......................................................... 26
  Classified Increase Edit ...................................................................... 27
  Classification Change List ................................................................. 28
  Classification Change Add ................................................................. 29
  Classification Change Edit ................................................................. 30
  Classified Merit Years List ................................................................. 31
  Classified Merit Years Mass Add ....................................................... 32
  Administration .................................................................................. 33
  Copy Parameters Tables .................................................................... 35
  Run # Copy Parameter Tables ............................................................ 36
  Initiate Projection ............................................................................... 37

Reference .............................................................................................. 39
  Annual Basis ..................................................................................... 39
  Budget Entity ................................................................................... 39
Budget Mart Web Introduction

Budget Mart Web is a supplemental application to biennial budget projections. Primarily it is used to enter budget related parameters needed to create accurate projections.

Budget Mart Web has three primary features:

- Entry of institution specific position and salary increase parameters
- Selection of the data to be seen in BI (This can also be accomplished from within BI)
- Administration of the projection process
  - Entry of system-wide, contracted increase parameters
  - Submission of biennial budget projections
  - Copy of previously used projection parameters for use in subsequent projections
  - Control of basic projection administration activities

As a user of Budget Mart Web, your access will be at one of two levels:

Institution Users
As a general user you have the ability to see and/or enter position and salary increase information that pertains directly to your institution only.

Chancellor's Office Budget and Management (BAM) Administrators
As an administrator you have access to all of the forms and see information pertaining to all institutions.

To access Budget Mart Web, copy the following link into your web browser:
http://www2.ous.edu/owbmdw/plsql/owbm_login

This takes you to a login page where you can type in your user id and password.

When you attend Budget Mart Web training, you will be assigned a user id automatically. Otherwise, you will need to contact the ITS helpdesk ((541)737-EASY) and request access. Either way, your assigned user id will be the same as your user id for the Budget Mart (in BI).
Budget Mart Web Shared Forms

Although both institution users and administrators use the same application, institution users see only a subset of the available menu items and forms. This section walks you through the application, as administrators see it, with notes where it will be different for institution users.

General Instructions

**Basic Form Use**

Below is a typical Budget Mart Web form. Most forms will behave similarly.

1. At the top of each form is a breadcrumb bar. The links on this bar take you back to the forms most commonly accessed from the form you are on.

2. Most list forms have sort options. To sort, click the radio button to the right of the attribute you wish to sort on and then click the Sort button.

3. Deleting a record is a two-step process and can be done from list forms only (like the one on this page). To delete, click the checkbox on all the rows you wish to delete. Then click the Delete Checked Items button at the bottom of the form.

4. List forms list all of the records in the selected parameter table. However, they usually do not list all the available fields. To see all of the information for a given record select the edit link for that record.

5. When the list is too long to fit on one page there is a scroll bar on the right side. You can use the scroll bar to reach the bottom of the form. To get back to the top quickly, you can use the Page Top link.
Budget Mart Web enforces data integrity in four primary ways:

- Field Validation
- Institution Level Security
- Locked Entry
- Validation Against Projection Information

Field Validation
Most data entry fields within the system have some type of associated validation. When you submit a form, if the data entered violates the validation you receive a list of related errors and an option to return to the form to fix the errors. You need to fix all of the errors on the form before being allowed to submit the information.

Field validation ensures that data entered is valid data that can be used correctly by the projection process.

Note: On the vacant positions form you have the ability to load data as it was entered into Banner. Data appropriate for Budget Mart projections will not necessarily match the validation rules required by Banner forms handling the same type of data. Positions you suspect of violating Budget Mart Web validation rules should be edited to comply before being marked with a status of Vacant.

Institution Level Security
Institution level security is apparent in two ways. First, only one user from a given institution may be logged in at a time. This ensures that users from the same institution aren't changing the data simultaneously. Second, as an institution user, you see only those forms that are designed for institution specific data entry, and only those records that apply to your institution.
Locked Entry

Access to forms for the purpose of data entry can be locked in two ways. First, when a projection is in progress, everyone (including admin) is locked out of all data entry forms. Second, the Chancellor’s Office Budget and Management (BAM) group as administrators of the system may lock the parameter tables for any institution at any time to allow for controlled projections. If you need access to a locked form, contact a BAM administrator.

When a form is locked, the word "locked" appears next to the menu option and you cannot access the form. However, you can always access the Projection Parameter Information form to view the current projection specifics.

If the tables are locked because the projection is in progress admin cannot modify Projection Parameter Information. In this case, the tables automatically unlock when the projection has completed.
**Validation Against Projection Information**

The information entered by the BAM administrators on the Projection Information form is required for validation on many other parameter forms. For this reason, if no data has been provided for Projection Information, all other forms will be inaccessible. If you get this message contact a BAM administrator for more information.
Main Menu
The Main Menu is the first page you see after logging in to the application.

Note: Institution users see only three options on this menu.

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modify/View Parameter Tables</td>
<td>Allows the input/modification/view of institution specific position and increase information. This includes: vacant positions, future positions, and unclassified increases.</td>
</tr>
<tr>
<td>Choose BI View</td>
<td>At any one time there may be two budget projections for the current biennium. One the administrator has marked as the Official projection and the other is marked as the Unofficial projection. However, BI can only report on only one projection at a time. This menu item allows you to choose which projection you prefer to see. This choice can also be made from within BI. (For more information on Official and Unofficial budget projections see the reference section of this manual)</td>
</tr>
<tr>
<td>Administration (Admin Only)</td>
<td>Allows an administrator to lock or clear working parameter tables, and swap official and unofficial projections.</td>
</tr>
<tr>
<td>Copy Parameter Tables From Previous Projections (Admin Only)</td>
<td>Allows for the selective copy of information from previously used parameter tables. This allows you to run a projection that will match exactly a projection run at a previous date, or to copy only some of the information to use as a starting place for a new projection.</td>
</tr>
<tr>
<td>Initiate Projection (Admin Only)</td>
<td>Launches a projection using the information currently in the working parameter tables.</td>
</tr>
<tr>
<td>Change your web password</td>
<td>Change your password for Budget Mart Web. We recommend that you make this password match the one you use to access BI. You can also provide additional information here to help us contact you, but it is not required. <strong>Note:</strong> after changing your password you will have to log in again.</td>
</tr>
</tbody>
</table>
The modify/View Parameters Tables Menu allows you to select parameters to modify or view. The administrator has the ability to lock these tables in order to ensure that the data isn’t changed during a projection. If the tables are locked, this menu takes you to a page where you can view the data without the ability to modify it. Similarly, you may be unable to modify the information in these tables if the administrator has not set up the base fiscal year and period for the projection. In this case, you will receive an error message and should contact a BAM administrator.

### Menu Item

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Projection Parameter Information (Modify by Admin Only)</strong></td>
<td>Select the fiscal year and period to be used as the projection snapshot. This must be selected before any other projection parameters can be input. This form is only modifiable by administrators.</td>
</tr>
<tr>
<td><strong>Classified Increase List (Admin and Chart K Only)</strong></td>
<td>Input any contracted classified COLA increases.</td>
</tr>
<tr>
<td><strong>Unclassified Adjustment List</strong></td>
<td>Input scheduled unclassified and graduate assistant increases. These increases are broken out by institution and employee class and should represent all increases intended within the current biennium.</td>
</tr>
<tr>
<td><strong>Classification Change List (Admin and Chart K Only)</strong></td>
<td>Input contracted changes in salary grade for classified employees.</td>
</tr>
<tr>
<td><strong>Future Position List</strong></td>
<td>Input complete position information for positions that are budgeted to become effective and be input into BANNER at a date beyond the snapshot, but are budgeted to start within the current biennium.</td>
</tr>
<tr>
<td><strong>Vacant Position List</strong></td>
<td>Input complete position information for vacancies. This can include real or logical positions that allow for accurate budget reporting on vacancies. Or import and correct complete position information for all position that are/were completely vacant during the snapshot period.</td>
</tr>
</tbody>
</table>
Projection Parameter Information

This form holds information that must be input before any other entry can be done. Most other forms look to the fiscal year and period input on this form to identify the current snapshot biennium and will not allow entry if the data in this form is not available. Only administrators can modify the data in this form. All other users will see a form that looks more like a list. Once a fiscal year and period are chosen and institutions have begun to enter data in other forms, it is important not to choose a different snapshot year and period without clearing all other forms.

According to data available in Budget Mart, you may choose the following options:

- Available Fiscal Year: 2003-04
- Available Fiscal Periods: 1-9
- Available Fiscal Year 2: None
- Available Fiscal Periods: None

Fiscal Year 2003-04
Fiscal Period 9
Run Comments

Future Position Comments

Classification Changes Comments

Unclassified Adjustment Comments

Classified Increase Comments

Vacant Position Comments

NIRSA Comments

NIRSA Comments

Submit
### Field(s) | Brief Description
---|---
Fiscal Year & Fiscal Period *(Modify by Admin Only)* | All other forms use the fiscal year and period entered here as a base for import and data entry restrictions. This should represent the fiscal year and period you intend to use as a base for the projection and should not be changed once the campus representatives have begun entering other parameter information. Note: you will only be able to select values that exist in the current biennium and have already been loaded into the budmart as snapshot data.

Run Comments *(Modify by Admin Only)* | A general description of the purpose of the run. If, for example, you intend to run a projection that excludes all vacant positions, you would note that here. Campus representatives use this note to determine what parameter information to enter. Administrators also use this comment to identify the unique characteristics of this run compared to others.

All Other Comment Fields *(Modify by Admin Only)* | These comments are used to identify anything unique about the use of a specific parameter table during this run. It can also be used to provide instructions to campus representatives in entering their parameter information.

### Form Use
- Choose a fiscal year and period to use as the snapshot and enter them into this form before doing any other work
- Enter any instructions or unique comments that will completely describe this run before asking campus representatives to enter parameter information
- Submit
- You can alter these comments at any time, but be sure that you inform campus representatives if instructions have changed

**Warning:** Don't change the fiscal year and period without clearing the other parameter tables first.
Unclassified Salary Adjustment List

This form lists all unclassified salary adjustments already entered into the system. Enter all planned or scheduled increases that fall within the same biennium as the projection snapshot date. Institution users see increases that are scheduled for their institution only, while administrators see increases scheduled for all institutions.

For description of columns see the Unclassified Salary Adjustment Mass Add/Update form.

Form Use

- Use the list to review all scheduled unclassified salary increases for your institution
- Use the Mass Add/Update button to add and/or modify multiple increases at one time
Unclassified Salary Adjustment Mass Add/Update

This form allows you to add and modify multiple records at the same time. For example, if you select Eclasses GG, UA and UB with a valid effective date and increase %, when you submit three records will be inserted, one for each eclass. If you then select GG, UC and UD with a different increase %, the record for GG will be updated while new records are inserted for UC and UD.

**Column** | **Brief Description**
---|---
COAS (Admin Only) | The Chart of Accounts Code representing the institution that will budget for the increase. Increases put in this table are institution wide and do not break down by budget entity. Click while holding down the shift or ctrl key on your keyboard to select multiple codes.  
EClass | The employee class code of the employees scheduled to get the increase. Click while holding down the shift or ctrl key on your keyboard to select multiple codes.  
Effective Date | The date the increase is planned to occur. The projection applies the increase as of the first of the month for any increases assigned for that month.
<table>
<thead>
<tr>
<th>Change Effective Date To (Optional)</th>
<th>This field can only be used if all selected eclasses already have records for the effective date in the Effective Date field. The idea is to change the date of an increase for all eclasses scheduled to get an increase on the effective date in the Effective Date field.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase %</td>
<td>-100.00% to 100.00%. You can only assign a % increase if you have not assigned a flat $ increase.</td>
</tr>
<tr>
<td>Annual Increase $</td>
<td>A set dollar amount per year that will be added to the salary of all positions within the specified eclass. You can only assign a flat $ increase if you have not assigned a % increase.</td>
</tr>
</tbody>
</table>

**Form Use**
- Select as many Coas codes and Eclass codes as apply to a given date and increase. Use the Shift key to select all values in a range. Use the Ctrl key to select specific values that are not next to each other. **Note:** Only admin can select Coas Code.
- Enter either a percent increase or a flat dollar increase, not both.
- If you enter a flat increase for an eclass and effective date that already has a percent increase, the flat increase will replace the percent increase (and visa versa).
- Click the reset button to clear all fields.

**Unclassified Salary Adjustment Edit**
To access the Edit form, select the Edit link next to any record on the List form. For a description of the fields on the edit form see Unclassified Salary Adjustment Mass Add/Update. The edit form does not have a Change Effective Date To field because for only one record you can simply change the Effective Date field.
Future Position List

This form lists future positions already entered into the system. Only positions with a planned budget and start date that were not yet entered into BANNER as of the projection snapshot date should show here. Projections ignore “future” positions with starting periods that not future to the current period or are not in the same biennium as the projection snapshot. Institution users see only their institutions positions, while administrators see positions scheduled for all institutions.

Valid future positions in this list will be projected starting on the assigned fiscal year and period, including any scheduled increases, through the end of the projection period.

<table>
<thead>
<tr>
<th>COAS</th>
<th>Fiscal Yr</th>
<th>Fiscal Per</th>
<th>Posn</th>
<th>Pos Title</th>
<th>Pos Type</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>2003-04</td>
<td>11</td>
<td>XC9996</td>
<td>test</td>
<td>P</td>
<td>edit</td>
<td>□</td>
</tr>
<tr>
<td>C</td>
<td>2003-04</td>
<td>11</td>
<td>XC9996</td>
<td>alskij</td>
<td>P</td>
<td>edit</td>
<td>□</td>
</tr>
<tr>
<td>C</td>
<td>2003-04</td>
<td>11</td>
<td>XC9994</td>
<td>lskj</td>
<td>P</td>
<td>edit</td>
<td>□</td>
</tr>
<tr>
<td>C</td>
<td>2003-04</td>
<td>12</td>
<td>XC9999</td>
<td>alskij</td>
<td>P</td>
<td>edit</td>
<td>□</td>
</tr>
</tbody>
</table>

For description of columns see the Future Position Add form.

Form Use

- Use the list to review all scheduled unclassified salary increases for your institution
- Use the Add button to create new positions
- Use the Edit link to view and modify the position in more detail
Future Position Add

This form allows you enter a new position that will become active within the projection on the assigned fiscal year and period.

COAS:  
Fiscal Year:  
Fiscal Period:  
Position:  
Position Title:  *This value must start with an X, then COAS (Ex: X0010)
Position Justification:
Position Status:
Budget Basis:
Annual Basis:
PClass:
Position EClass:
Appointments %:
Annual Salary Budget:
Position Type:

Add Future Position LD

Fund Code LD %

Submit Reset
<table>
<thead>
<tr>
<th>Column</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COAS (Admin Only)</td>
<td>The Chart of Accounts Code representing the institution that will budget for the position. Positions put in this table will be related to a Budget Entity based on the assigned Fund Code.</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>The fiscal year that the position will become active. This should be represented as the second calendar year in the fiscal year (e.g. 2004-05 is entered as 2005). This year must be within the same biennium as the assigned projection snapshot fiscal year. Additionally, this fiscal year, in combination with the fiscal period, must be later than the assigned projection snapshot year and period.</td>
</tr>
<tr>
<td>Fiscal Period</td>
<td>The fiscal period that the positions will become active. This fiscal period, in combination with the fiscal year, must be later than the assigned projection snapshot year and period.</td>
</tr>
<tr>
<td>Position</td>
<td>The position number. This number must begin with an X, followed by the COAS code the position will be tied to. The remaining three characters can be any combination of numbers and letters.</td>
</tr>
<tr>
<td>Position Title</td>
<td>The title of the position, no more than 30 characters in length.</td>
</tr>
<tr>
<td>Position Justification</td>
<td>A brief description of the reason behind entering this as a future position. No more than 250 characters in length.</td>
</tr>
<tr>
<td>Position Status</td>
<td>Always 'F' for Future position.</td>
</tr>
</tbody>
</table>
| Budget Basis        | The number of months this position is budgeted to work in a given year. To create a position with > 1 FTE, make this number bigger than the Annual Basis. If this value creates a position with > 1 FTE, the Position Type should be set to Pooled. FTE is calculated based on this field as:  
  \[
  \text{FTE} = \frac{\text{Budget Basis} \times \text{Appointment \%}}{100} 
  \] |
| Annual Basis        | The contract basis, or the number of months that qualify as full time. This value must always be 9 or 12. To create a position with > 1 FTE, the Budget Basis must be bigger than the Annual Basis. FTE is calculated based on this field as:  
  \[
  \text{FTE} = \frac{\text{Budget Basis} \times \text{Appointment \%}}{100} 
  \] |
| Pclass              | The code identifying the position class to which this position is assigned. The available list is based on valid values in NTRPCLS. |
| Position Eclass     | The employee class related to the assigned position class. For Classified positions this value will automatically be changed to match the default employee class based on the position class from NTRPCLS. |
| Appointment %       | The percentage of each month budgeted for an employee to work. FTE is calculated based on this field as:  
  \[
  \text{FTE} = \frac{\text{Budget Basis} \times \text{Appointment \%}}{100} 
  \] |
| Annual Salary Budget| The amount budgeted as an annual salary for this position at the assigned FTE. |
| Position Type       | Single or Pooled. If the components of FTE are such that the FTE will be greater than 1, this value should be set as Pooled. |
| Fund Code           | A valid fund code for your institution. The fund type, fund group and budget entity will be automatically identified based on the value entered. If entering multiple positions as one Pooled position, pick a fund code that calculates the correct fund type title and budget entity. |
| LD %                | The percentage of the Annual Salary Budget that will be paid by the associated fund. |
**Form Use**

- Only add future positions that are scheduled and budgeted already, but simply have not been input into BANNER.
- Do not add positions here that should be projected through the entire four-year projection period. Future positions appear in the projection on their assigned future fiscal year and period and are carried through to the end.
- You may group like positions into one pooled position for projection purposes. Be sure the Budget Basis, Annual Basis and Appointment Percent will calculate to the correct FTE, set the Position Type to Pooled and choose Funds that will associate the FTE and salary costs to the appropriate Fund Type Title and Budget Entity. You will need to create a new pool for each different Fund Type Title and Budget Entity you want represented.
- To clear fields and start over, press the reset button.

**Future Position Edit**

To access the Edit form, select the Edit link next to any record on the List form. For a description of the fields on the edit form see Future Position Add.

*Form Use*

- The reset button on the Edit form will set the value back to their original state.
Vacant Position List

This form lists vacant positions already entered into the system. You should end up with all valid vacant positions on this form. Pooled positions are vacant only if the positions filled FTE is zero. Positions that were vacant or absent in BANNER at the time of the projection snapshot are considered vacant. Institution users see positions for their institution only, while administrators see positions for all institutions.

Valid positions entered on this form will be included in the projection starting in July of the first year and continue through all four years of the projection.

Valid positions entered on this form will be included in the projection starting in July of the first year and continue through all four years of the projection.

Form Use

- Use the list to review all vacant positions for your institution
- To copy all completely empty positions from the projection snapshot period use the Load From Budmart Button. Note: Administrative users will not see this button.
- To mark the valid vacant positions with 'Vacant' use the Switch Status check box. Those marked with 'Ignore' at the time of projection will be ignored.
- To delete all previously loaded records and start from scratch use the Reload Button. Warning: any modifications you've made to the automatically loaded records will be lost. Note: Administrative users will not see this button.
- Use the Add button to create new vacant positions
- Use the Edit link to view and modify the position in more detail
Vacant Position Add

This form allows you to enter a new vacant position that will become active in the projection starting in July of the 1st year and continue through all four years of the projection.

Vacant Position Add

COAS: B
Fiscal Year: 2004
Fiscal Period: 09
Position: *This value must start with a COAS code and end with an X
Position Title: 
Position Status: Vacant
Budget Basis: 
Annual Basis: 03
PClass: E0010
Position Eclass: CA
Appointment %: 
Annual Salary Budget: 
Position Type: Pooled

Add Vacant Position LD

<table>
<thead>
<tr>
<th>Fund Code</th>
<th>LD %</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Submit  Reset
<table>
<thead>
<tr>
<th>Column</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COAS (Admin Only)</td>
<td>The Chart of Accounts Code representing the institution that will budget for the position. Positions put in this table will be related to a Budget Entity based on the assigned Fund Code.</td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>The fiscal year the position was vacant. Always defaults to the projection snapshot fiscal year.</td>
</tr>
<tr>
<td>Fiscal Period</td>
<td>The fiscal period the position was vacant. Always defaults to the projection snapshot fiscal period.</td>
</tr>
<tr>
<td>Position</td>
<td>The position number. This number must begin with the COAS code the position will be tied to (for institution users, this must be your COAS code) and end with an X. The remaining three characters can be any combination of numbers and letters that are meaningful to you. Note: For positions loaded from Budmart, the position code will match the one in BANNER until you edit the position.</td>
</tr>
<tr>
<td>Position Title</td>
<td>The title of the position, no more than 30 characters in length.</td>
</tr>
<tr>
<td>Position Status</td>
<td>Either 'V' for Vacant or 'I' for Ignore. If the status is set to 'I' the position will not be included in the projection.</td>
</tr>
<tr>
<td>Budget Basis</td>
<td>The number of months this position is budgeted to work in a given year. To create a position with &gt; 1 FTE, make this number bigger than the Annual Basis. If this value creates a position with &gt; 1 FTE, the Position Type should be set to Pooled. FTE is calculated based on this field as: Budget Basis * (Appointment % / 100) Annual Basis</td>
</tr>
<tr>
<td>Annual Basis</td>
<td>The contract basis, or the number of months that qualify as full time. This value must always be 9 or 12. To create a position with &gt; 1 FTE, make the Budget Basis bigger than the Annual Basis. FTE is calculated based on this field as: Budget Basis * (Appointment % / 100) Annual Basis</td>
</tr>
<tr>
<td>Pclass</td>
<td>The code identifying the position class to which this position is assigned. The available list is based on valid values in NTRPCLS.</td>
</tr>
<tr>
<td>Position Eclass</td>
<td>The employee class that related to the assigned position class. For Classified positions this value will automatically be changed to match the default employee class based on the position class from NTRPCLS.</td>
</tr>
<tr>
<td>Appointment %</td>
<td>The percentage of each month budgeted for an employee to work. FTE is calculated based on this field as: Budget Basis * (Appointment % / 100) Annual Basis</td>
</tr>
<tr>
<td>Annual Salary Budget</td>
<td>The amount budgeted as an annual salary for this position at the assigned FTE.</td>
</tr>
<tr>
<td>Position Type</td>
<td>Single or Pooled. If the components of FTE are such that the FTE will be greater than 1, this value should be set as Pooled.</td>
</tr>
<tr>
<td>Fund Code</td>
<td>A valid fund code for your institution. The fund type, fund group and budget entity will be automatically identified based on the value you enter. If you are entering multiple positions as one Pooled position, pick a fund code that will calculate the correct fund type title and budget entity.</td>
</tr>
<tr>
<td>LD %</td>
<td>The percentage of the Annual Salary Budget that will be paid by the associated fund.</td>
</tr>
</tbody>
</table>
**Form Use**
- Enter additional budgeted vacant positions. Be sure these positions were budgeted for and vacant at the time of the projection snapshot year and period. These positions will be projected as any other vacant position and thus will enter the projection process in July of the first year and be projected over the entire four year projection period.
- You may group like positions into one pooled position for projection purposes. Be sure the Budget Basis, Annual Basis and Appointment Percent will calculate to the correct FTE, set the Position Type to Pooled and choose Funds that will place associate the FTE and salary costs to the appropriate Fund Type Title and Budget Entity. You will need to create a new pool for each different Fund Type Title and Budget Entity you want represented.
- Press the Reset button to clear fields and start over.

**Vacant Position Edit**

To access the Edit form, select the Edit link next to any record on the List form. For a description of the fields on the edit form see Vacant Position Add.

**Form Use**
- To set the value back to their original state use the reset button on the Edit form.
- Once you edit a vacant position that was loaded directly from HR data you will have to adhere to the validation rules of the form. It is a good idea to edit any position that you suspect will have incomplete or invalid data, as even positions loaded into the web application will be ignored if the data is invalid according to the rules of projection.
- The positions that have invalid data in the HR system will appear on exception reports in BI.
Choose BI View

This form changes the information that will be seen when running reports out of BI. You can also accomplish this using the Switch BI View button within the Budget Mart in BI.

Form Use

Select the data set you would like to see, Official or Unofficial. If you select to view the Official data set, you must also select a Starting Biennium. Because each projection represents two biennia, the Starting Biennium represents the first Biennium in the projection. This allows you to select the current official projection or a historical official projection. The starting biennium is always represented by the second fiscal year of the first biennium in the projection.
BUDGET MART WEB ADMINISTRATION FORMS

There are two types of administration forms, those that allow for the entry of system-wide parameters, and those that manage the parameter tables as a whole. System-wide parameter forms are accessed from the Modify/View Parameter Tables menu and can be used by both Administrators and Chart K users. Parameter management forms are accessed from the Main Menu and can be used by administrators only.

Classified Increase List

Lists contracted classified increases already in the system. Only increases (usually COLA) falling within the projection snapshot biennium should show. Currently, this information is compiled by the Chancellor's Office HR department and given to the Chancellor's Office Payroll group just before the first contracted increase. The Payroll group adds this new salary information to BANNER before the increase is scheduled to occur.

Note: Since projections depend on this data being available, a BAM administrator should coordinate with HR and Payroll to ensure timely insertion of salary information into BANNER, especially if the first scheduled increase of the Biennium falls after the planned projected snapshot date.

Classified Increase List

<table>
<thead>
<tr>
<th>Sali Table</th>
<th>Prior Sali</th>
<th>Sali Grp</th>
<th>% Change</th>
<th>Eff Date</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>CH</td>
<td>20031A</td>
<td>20032A</td>
<td></td>
<td>01-JAN-04</td>
<td>edit</td>
<td></td>
</tr>
<tr>
<td>CH</td>
<td>20023A</td>
<td>20034A</td>
<td></td>
<td>01-FEB-05</td>
<td>edit</td>
<td></td>
</tr>
<tr>
<td>CS</td>
<td>20001A</td>
<td>20023A</td>
<td></td>
<td>01-JAN-04</td>
<td>edit</td>
<td></td>
</tr>
<tr>
<td>IH</td>
<td>20023A</td>
<td>20023A</td>
<td>2.00</td>
<td>01-JAN-04</td>
<td>edit</td>
<td></td>
</tr>
<tr>
<td>IH</td>
<td>20023A</td>
<td>20034A</td>
<td></td>
<td>01-FEB-05</td>
<td>edit</td>
<td></td>
</tr>
<tr>
<td>IS</td>
<td>20023A</td>
<td>20034A</td>
<td></td>
<td>01-FEB-05</td>
<td>edit</td>
<td></td>
</tr>
</tbody>
</table>

For description of columns see the Classified Increase Or IT % Increase Add form.

Form Use

- Use the list to review all scheduled classified increases
- To add increases for Technology staff based on a flat %, use the Add IT % Increase.
- To add increases based on a change in Salary Group, use the Add Classified Increase button.
Budget Data Mart

Classified Increase Add

This form allows you to add union contracted classified increases that rely on salary tables to determine the increase amounts. Any required salary groups must first be added to BANNER.

<table>
<thead>
<tr>
<th>Column</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Table</td>
<td>Part of the identification of salary information in NTRSALA. First character logic: C–Classified, G–GCIU, I–IT. Second character logic: S–Salary, H–Hourly. The salary table selected here will receive the scheduled increase according to the other fields.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The date the increase is planned to occur. The projection applies the increase as of the first of the month for any increases assigned for that month.</td>
</tr>
<tr>
<td>Salary Group Before Increase</td>
<td>Part of the identification of salary information in NTRSALA. The Salary Group here depicts the group that was effective during the period before the increase occurred.</td>
</tr>
<tr>
<td>Salary Group After Increase</td>
<td>Part of the identification of salary information in NTRSALA. The Salary Group here depicts the group that will be effective after the effective date.</td>
</tr>
</tbody>
</table>

Form Use

- The values entered in this form should match the classified union contract and the related salary group codes that were entered into BANNER.
Classified Increase (IT %) Add

This form allows you to add percent increases for classified IT positions. These increases may or may not be union contracted and do not rely on data input in BANNER. They do require the entry of the current salary group so that the projection can identify the upper and lower bounds for the positions salary.

<table>
<thead>
<tr>
<th>Column</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary Table</td>
<td>Part of the identification of compensation plan used to get salary information out of NTRSALB. First character logic: C–Classified, G–GCIU, I–IT. Second character logic: S–Salary, H–Hourly. The salary table selected here will receive the scheduled increase according to the other fields.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>The date the increase is planned to occur. The projection applies the increase as of the first of the month for any increases assigned for that month.</td>
</tr>
<tr>
<td>Current Salary Group</td>
<td>Part of the identification of salary information in NTRSALB. The Salary Group here depicts the group that is effective on the increase effective date.</td>
</tr>
<tr>
<td>Percent Change</td>
<td>The percent increase scheduled to occur on the effective date. All classified IT employees will get the same percent increase but will not be allowed to go above the upper limit or below the lower limit of their salary range.</td>
</tr>
</tbody>
</table>
Form Use

- This form cannot be used to apply a new salary group. Percent increases only.

Classified Increase Edit

To access the Edit form, select the Edit link next to any record on the List form. For a description of the fields on the edit form see the Classified Increase or IT % Increase Add form. You cannot change the type of increase on this form. If you wish to add a salary group change instead of a percent increase (or visa versa) you must delete the existing increase and add a new one of the correct type.
Classification Change List

Lists contracted classification (Salary Grade) changes already in the system. You should enter only contracted changes that will fall within the projection snapshot biennium. Because the projection depends on NTRSLA and/or NTRSLB to get specific salary information based on the values input on this table, any identified salary grades must exist in NTRSLA or NTRSLB and NTRPCLS in BANNER.

Assistance from CO HR and Payroll is required to get this classification change information from its normal paper form in the union contract and into the projection system data base, ready for use in projections.

For description of columns see the Classification Change Add form.

**Form Use**

- Use the list to review all scheduled classification (Salary Grade) changes
- To create additional classification changes use the Add button

<table>
<thead>
<tr>
<th>Class Code</th>
<th>Class Description</th>
<th>Prior Grade</th>
<th>New Grade</th>
<th>Effective Date</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>0312</td>
<td>Campus Dispatcher</td>
<td>13</td>
<td>14</td>
<td>01-MAR-04</td>
<td>edit</td>
<td></td>
</tr>
<tr>
<td>2205</td>
<td>Archivist</td>
<td>19</td>
<td>21</td>
<td>01-MAR-04</td>
<td>edit</td>
<td></td>
</tr>
<tr>
<td>0114</td>
<td>Bio Science Research Tech 2</td>
<td>14</td>
<td>15</td>
<td>01-MAR-04</td>
<td>edit</td>
<td></td>
</tr>
<tr>
<td>0115</td>
<td>Bio Science Research Tech 3</td>
<td>16</td>
<td>17</td>
<td>01-MAR-04</td>
<td>edit</td>
<td></td>
</tr>
</tbody>
</table>

Delete Checked Items
Classification Change Add

This form allows you to add union contracted classification (Salary Grade) changes. Any required salary grades must first exist in BANNER.

### Classification Change Add

### Column | Brief Description
--- | ---
Classification Code | The position classification that is scheduled for change. This code is the last four digits of the Pclass code. The description seen on the List form comes from NTRPCLS based on the related Pclass code but won’t be seen here unless you look the code up using the Lookup NTRPCLS button.
Effective Date | The date the increase is planned to occur. The projection applies the change as of the first of the month.
Prior Grade | Part of the identification of salary information in NTRSALA and NTRSALB. The Salary Grade here depicts the grade that was effective during the period before the increase occurred.
New Grade | Part of the identification of salary information in NTRSALA and NTRSALB. The Salary Grade here depicts the grade that will be effective after the effective date.
Form Use

- Use the Lookup Classification Code Description to look up a classification code and return the related description from NTRPCLS.
- The values entered in this form should match the classified union contract and the related information in the NTRPCLS table in BANNER.

Classification Change Edit

To access the Edit form, select the Edit link next to any record on the List form. For a description of the fields on the edit form see the Classification Change Add form. You cannot change the type of increase on this form.
Classified Merit Years List

Lists scheduled merit increases already in the system.

For description of columns see the Classified Merit Years Mass Add form.

**Form Use**

- Use the list to review years specified for scheduled merit increases
- To specify additional merit increase years use the Add button
Classified Merit Years Mass Add

Use this form to specify the years within the four-year projection in which merit increases will be given to filled positions for the represented COAS code. Represented fiscal years should fall within the projection period.

**Column** | **Brief Description**
---|---
COAS | The Chart of Accounts Code representing the institution that will receive merit increases for the specified year. Years specified in this table apply institution wide and do not break down by budget entity. Hold down the shift or ctrl key on your keyboard to select multiple codes.
Fiscal Year | The fiscal year in which increases are planned to occur. The projection applies merit increases as of the first of the month specified by the employees merit date. These increases will only occur for filled, classified positions with a valid merit date that are below the top of their salary range.

**Form Use**
- Typically merit increases have occurred the first three years of the projection for all COAS codes.
Administration

This form allows BAM administrators to manage the projection tables.

Parameters Tables

Locked

- EOU
- OIT
- CSU
- CO
- SOU
- UO
- WOU

Submit

Swap Projections

This will replace the Official Projection for the current Biennium with the most recent unofficial projection. The previously official data will be available as unofficial until another projection is run.

Submit

Clear Active Parameter Tables

- Classified Merit Years
- Salary Group Change
- Unclass COLA
- Class Change
- Future Position
- Vacant Position

Delete Selected

Delete ALL
**Form Use**

**Parameter Tables – Locked**

- Use this section to disable entry into the parameters tables by institution. If the box next to an institution is checked, they will be unable to add or edit any records within the web application.

**Swap Projections**

- Clicking the Submit button in this section will switch the unofficial projection with the official projection of the current budget period. If there is not yet an official projection for the current budget period, the unofficial projection becomes official, and there will be no unofficial projection.

  **Warning:** The previous official projection will then be unofficial and will be replaced next time a projection is run, or at the end of the biennium.

**Clear Active Parameter Tables**

- The active parameter tables are the ones that will be used the next time you run a projection. This section allows you to delete all the records in the selected parameter tables.

  **Warning:** This will delete all records for all institutions in the selected table. These records cannot be retrieved once deleted.

- To delete all of the parameter tables at once, click the Delete All button. This will delete the entire set of tables including the Projection Information table.

  **Warning:** This will delete all records for all institutions in the selected table. These records cannot be retrieved once deleted.
Copy Parameters Tables

The portion of the application allows you to copy parameter information from previous projections (based on run number) into the active parameter tables. Once this data is in the active parameter tables you can either run the projection unchanged or modify the parameters using other forms. If you copy all of the data in all of the parameter tables, you will be able to run the projection again and get the same results you got last time it was run.

This form lists the basic run information for all projections that have been run during the current biennium.

<table>
<thead>
<tr>
<th>Run #</th>
<th>Date</th>
<th>Official/Unofficial</th>
<th>Biennium (Starting)</th>
<th>FY/FP (Snapshot)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>53</td>
<td>12-MAR-04</td>
<td>U</td>
<td>2005</td>
<td>2004/09</td>
<td>test load_hist for period 09</td>
</tr>
<tr>
<td>52</td>
<td>11-MAR-04</td>
<td>N</td>
<td>2005</td>
<td>2004/09</td>
<td>test load_hist for period 09</td>
</tr>
<tr>
<td>61</td>
<td>11-MAR-04</td>
<td>N</td>
<td>2005</td>
<td>2004/09</td>
<td>test load_hist for period 09</td>
</tr>
<tr>
<td>18</td>
<td>10-FEB-04</td>
<td>N</td>
<td>2005</td>
<td>2004/08</td>
<td>snapshot</td>
</tr>
<tr>
<td>7</td>
<td>05-DEC-03</td>
<td>N</td>
<td>2003-05</td>
<td>2003/01</td>
<td>snapshot</td>
</tr>
</tbody>
</table>

Column          | Brief Description                                                                                                                                                                                                 |
-----            | -----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
Run #           | This number is automatically generated each time you run a projection. It is simply a counter that allows you to distinguish specific runs.                                                                                |
Date            | The Calendar date on which the projection was run.                                                                                                                                                                |
Official/Unofficial | Shows if the run is currently the Unofficial or Official projection. O: Official; U: Unofficial; N: Neither.                                                                                                         |
Biennium (Starting) | The starting biennium for the projection. This is shown as the second fiscal year of the first biennium. Example: A run that spans July 2003 – June 2007 (2 biennia) represents fiscal years: 2004, 2005, 2006, 2007 and has a starting biennium of 2005 (the second fiscal year of the first biennium). |
FY/FP (Snapshot) | The fiscal year and period of the snapshot used for the projection.                                                                                                                                               |
Comments        | The general comments describing the purpose of the run as a whole. This should explain what makes this run unique.                                                                                              |

Form Use

- Use the list to identify the desired projection run
- To see, in a separate window, all the comments attached to this run use the Details link
- To select which parameter tables you would like to copy from history into the active parameter tables use the Choose Tables link
Run # Copy Parameter Tables

From here you can identify which parameter tables to copy and for which institutions. This allows you to either copy all parameters from a given run or to selectively copy only those tables you want to match a previous run. **Warning:** when you copy a parameter table from history, the new data will replace any data already in the active parameter tables.

### Field Brief Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COAS</td>
<td>Future Positions, Vacant Positions, and Unclassified Adjustments are institution specific. For these tables you can hold down the Ctrl or Shift key on your keyboard to select as many institutions as you wish.</td>
</tr>
<tr>
<td>Check Boxes</td>
<td>The Classification Change, Classified Merit and Classified Increase tables represent parameters that always affect all institutions, thus by checking the box you have selected to copy all data from those tables.</td>
</tr>
</tbody>
</table>

### Form Use

- To select COAS codes for each parameter table hold down the Ctrl or Shift key.
- To copy remaining parameter tables check the related box.
- Use the Show Summary Data for all COAS link to bring up a pop-up window that shows a list of the data for the associated table. This window will only show the key fields related to each record that will be copied and will show all records regardless of which COAS codes are selected.
- Click the Copy Selected button. **Note:** The copy can take several minutes.

**OR**

- To make a complete copy of the parameters for the selected run click the Copy All Tables button. This will copy all the tables shown, for all institutions. It will also copy the snapshot fiscal year and period as well as the table specific comments that went with the selected run. The idea here is to be able to rerun the projection exactly as it was. However, you can also use this feature to run a projection with only minor modifications from a previous run. **Note:** The copy can take several minutes.
Initiate Projection

This form allows you to make final adjustment to the run comments and submit a projection. Submitting a projection sends a request to ITS Operations. Staff will normally process a request within an hour if received between 7:00 AM and 6:00 PM, M-F,. (if you will need a projection run outside regular business hours, please inform the ITS helpdesk ahead of time). Projections usually take approximately one and a half hours to run after Operations staff acts on a request.

When the process is complete, you and representatives at each campus will receive email notification. Your results will exist as an unofficial projection.
<table>
<thead>
<tr>
<th>Field(s)</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiscal Year &amp; Fiscal Period (View Only)</td>
<td>This is the fiscal year and period that will be used as the snapshot period for the projection. This fiscal year and period was entered on the Projection information form at the beginning of the process. It cannot be altered here because all of the projection parameters have been entered according to the pre-assigned snapshot period.</td>
</tr>
<tr>
<td>Starting Biennium (View Only)</td>
<td>The starting biennium for the projection based on the above fiscal year and period. This is shown as the second fiscal year of the first biennium. Example: A run that spans July 2003 – June 2007 (2 biennia) represents fiscal years: 2004, 2005, 2006, 2007 and has a starting biennium of 2005 (the second fiscal year of the first biennium). This values defaults based on the Fiscal Year and Period.</td>
</tr>
<tr>
<td>Run Comments</td>
<td>A description that distinguishes this run from the others. If, for example, you want to run a projection that excludes all vacant positions, you would specify that here.</td>
</tr>
<tr>
<td>All Other Comment Fields</td>
<td>These comments are used to identify anything unique about the use of a specific parameter table during this run. The values entered on the Projection Information form are the default here.</td>
</tr>
</tbody>
</table>

**Form Use**

- Enter any comments that will help you distinguish this run from others and that describe how each parameter table was used
- Click the Continue button
- You can alter these comments before submitting a projection, but be sure that you don’t eliminate any information that was used by the campuses in determining how to set up their parameters
REFERENCE

Annual Basis

See OUS Annual Basis.

Budget Entity

Abbreviations of mutually exclusive organizations, *determined by the fund code* being used. All values are shown below with corresponding description:

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AES</td>
<td>Agriculture Experiment Station</td>
<td>OIT</td>
<td>Oregon Institute of Technology</td>
</tr>
<tr>
<td>CO</td>
<td>Chancellor’s Office</td>
<td>OSU</td>
<td>Oregon State University</td>
</tr>
<tr>
<td>CAS</td>
<td>Cascades Campus (Bend)</td>
<td>PSU</td>
<td>Portland State University</td>
</tr>
<tr>
<td>CEC</td>
<td>OCECS (Oregon College of Engineering and Computer Science)</td>
<td>SOU</td>
<td>Southern Oregon University</td>
</tr>
<tr>
<td>EOU</td>
<td>Eastern Oregon University</td>
<td>UO</td>
<td>University of Oregon</td>
</tr>
<tr>
<td>ES</td>
<td>Extension Services</td>
<td>WOU</td>
<td>Western Oregon University</td>
</tr>
<tr>
<td>FRL</td>
<td>Forest Research Labs</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: The statewides (AES, ES and FRL) are funded separately from OSU and therefore mutually exclusive, even though they are closely related to OSU

COAS Code

Organization's one character chart of account value. All values are shown below with corresponding abbreviation:

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>UO</td>
</tr>
<tr>
<td>C</td>
<td>OSU</td>
</tr>
<tr>
<td>C</td>
<td>AES</td>
</tr>
<tr>
<td>C</td>
<td>CAS</td>
</tr>
<tr>
<td>C</td>
<td>ES</td>
</tr>
<tr>
<td>C</td>
<td>FRL</td>
</tr>
<tr>
<td>D</td>
<td>PSU</td>
</tr>
<tr>
<td>E</td>
<td>WOU</td>
</tr>
<tr>
<td>F</td>
<td>SOU</td>
</tr>
<tr>
<td>G</td>
<td>EOU</td>
</tr>
<tr>
<td>H</td>
<td>OIT</td>
</tr>
<tr>
<td>K</td>
<td>CO</td>
</tr>
<tr>
<td>K</td>
<td>CEC</td>
</tr>
</tbody>
</table>

Fund Grouping

The Fund Types are grouped (and often subtotaled) into fund groups based on the source of the funds. The groups are defined as follows:

<table>
<thead>
<tr>
<th>Fund Group</th>
<th>Fund Type</th>
<th>$</th>
<th>FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budgeted Operations</td>
<td>11</td>
<td>Limited</td>
<td>NonExempt</td>
</tr>
<tr>
<td>Self Support Operations</td>
<td>12, 13, 14, 20, 81</td>
<td>Unlimited</td>
<td>NonExempt</td>
</tr>
<tr>
<td>Restricted Funds (Grants and Contracts)</td>
<td>30</td>
<td>Unlimited</td>
<td>Exempt</td>
</tr>
</tbody>
</table>
**Funding Type (Fund Type Title)**

Fund code is looked up in the FIS FWRFDHC table (from the OWAG instance)

<table>
<thead>
<tr>
<th>FWRFDHC Columns (Banner)</th>
<th>BudgetMart Columns</th>
</tr>
</thead>
<tbody>
<tr>
<td>FTYP_Level_2</td>
<td>Fund_Level_2</td>
</tr>
<tr>
<td>11</td>
<td>not '010000' or '016000'</td>
</tr>
<tr>
<td>11</td>
<td>'010000'</td>
</tr>
<tr>
<td>11</td>
<td>'016000'</td>
</tr>
<tr>
<td>12</td>
<td>N/A</td>
</tr>
<tr>
<td>13</td>
<td>N/A</td>
</tr>
<tr>
<td>14</td>
<td>N/A</td>
</tr>
<tr>
<td>Not 11, 12, 13 or 14</td>
<td>N/A</td>
</tr>
<tr>
<td>Not 11, 12, 13 or 14</td>
<td>N/A</td>
</tr>
<tr>
<td>Not 11, 12, 13 or 14</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Official and Unofficial Budget Projections**

In order to allow for the variability of the budgeting process, the Budget Mart allows for two active projections at any one time. When a projection is first submitted it starts as an unofficial projection. Once a projection is considered final, it is marked official it cannot be modified (unless it is purposefully replaced by a new unofficial projection). With the official projection safely stored, additional unofficial projections can be made throughout the budget process as a tool for administrators to play out what-if scenarios.

**OUS Annual Basis**

<table>
<thead>
<tr>
<th>Employee Class</th>
<th>OUS Annual Basis</th>
</tr>
</thead>
<tbody>
<tr>
<td>'UA','UC','UE','UG','XB'</td>
<td>9</td>
</tr>
<tr>
<td>'CA','CB','CD','CE','GG','UB','UD','UF','UH','UX','UY','GJ'</td>
<td>12</td>
</tr>
</tbody>
</table>

If the OUS Annual Basis is 9 but the assigned Banner Annual Basis is between 10 and 12, then the OUS Annual Basis is assigned to 12.

**OUS FTE**

FTE for each Job is calculated as:

\[
\text{Job Appointment Basis} \times \left( \frac{\text{Job Appointment \%}}{100} \right) \times \text{OUS Job Annual Basis}
\]

FTE for each Position is calculated as:

\[
\text{Budget Basis} \times \left( \frac{\text{Budget Appointment \%}}{100} \right) \times \text{OUS Posn Annual Basis}
\]

**Reportable Positions**

- Any position with a reportable job attached to it (even if the Position Eclass is not reportable)

Reportable Eclass ('CA', 'CB', 'CD', 'CE', 'GG', 'UB', 'UD', 'UF', 'UH', 'UX', 'UY', 'GJ', 'UA', 'UC', 'UE', 'UG', 'XB')