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This guide is intended for users of the UCR Reporting System (UCR RS), with the Analyst Role. Its goal is to provide a general understanding of the different projections, as well as directions on how to access these sections, and enter manual entries. If you do not have access to this role and would like to request access, please visit the UCR Reporting System for more information.
How to Enter Projections for New Employees:

The employee projections sections are intended to be used as a modeling of current and/or future workforce planning. UCR RS, will automatically populate the most current payroll information entered into PPS/HRDW, as a starting point. It does not automatically account for open provisions, future bargaining unit wage increases, or ATB adjustments. You will be able to manually modify, add, or manipulate future projections to reflect their anticipated plan for the fiscal year.

**Step 1:** Using the drill down menu, on the left hand side, select the Division, Department, or Activity that needs a new employee projection entered.

**Step 2:** Select the type of employee you are projecting, from the projection drop down menu.
Step 3: Click on Add Projection on the employee projection management screens

Step 4: Fill in all of the fields, including the monthly projected salary and click save. If you do not know or are unsure about what information to enter, simply start typing in the field box, and the system will automatically search, after you enter two characters.

*Note: Entering the pay rate, does not automatically calculate and populate a projected amount. You will need to manually add an amount into each month or the projected amount will be $0.

Example 1- Salaried Employee Projection

A salaried employee, in UCR RS, is an exempt employee who, based on duties performed and manner of compensation, are exempt from the FLSA minimum wage and overtime provisions. Exempt employees are paid at an established monthly or annual salary and are expected to fulfill the duties of their positions regardless of hours worked. They are not eligible to receive overtime compensation or compensatory time off. Exempt titles are identified in University wide title and pay plans.
Example 2- Hourly Staff Employee Projection

An hourly employee, in UCR RS, is a non-exempt employee who, based on duties performed and manner of compensation, is subject to all FLSA provisions. They are required to account for time worked on an hourly and fractional hourly basis and are to be compensated for qualified overtime hours at the premium rate. Non-exempt titles are identified in University wide title and pay plans.

Example 3- Hourly Student Employee Projection

Student employees, in UCR RS, are part-time employees who are currently enrolled in school at UCR. They are hired as casual-restricted appointments at less than 50% time. Title codes used under this type of employment are Student 1 and Student 2.

Tip: Student employees are listed without a name in UCR RS. We suggest that you enter their name, or identifying title, ie “Front Desk Clerk,” in the comments field, in order to distinguish between students, OR you may enter one single projection for multiple students.
Step 5: Click Save and Verify. A Save Changes Result box will appear once you have successfully added a projection.

To verify that your projection was added in the correct FAU, simply go back to the employee projection management screen and verify that your entry is there. All changes and additions are highlighted in orange.
How to Edit Projections for Existing Employees:

The employee projections sections are intended to be used as a modeling of current and/or future workforce planning. UCR RS, will automatically populate the most current payroll information entered into PPS/HRDW, as a starting point. It does not automatically account for open provisions, future bargaining unit wage increases, or ATB adjustments. You will be able to manually modify, add, or manipulate future projections to reflect their anticipated plan for the fiscal year.

**Step 1:** Using the drill down menu, on the left hand side, select the Division, Department, or Activity that needs a new employee projection entered.

**Step 2:** Select the type of employee you are projecting, from the projection drop down menu.

**Step 3:** Click on the pencil icon, next to the person you want to edit.
**Step 4:** Fill in the fields, including the monthly projected amount and click save. *Note: If you fill in the monthly pay rate amount it will not automatically calculate the projected amount. An amount must be put*

**Step 4:** Fill in each month’s field with the difference in pay. The system will update the sum of monthly projections (system calculated projections + user projections), and will give you a total monthly projection in the Sum of Monthly Projections row.

*Note: There are two options intended to help the Analyst, Zero Out Projections and Reset Projections. By clicking on Zero Out Projections, the system will create an entry, in the User Projections row, to make the total projections zero. By clicking on Reset Projections, the system will delete the entries, in the User Projections row.

**Step 5:** Click Save and Verify. A Save Changes Result box will appear once you have successfully added a projection.
To verify that your projection was added in the correct FAU, simply go back to the employee projection management screen and verify that your entry is there. All changes and additions are highlighted in orange.
How to Enter a New Non-Salary Projection:
The non-salary projections are intended to be used as a modeling of future non-salary expenses. UCR RS, will automatically populate a projection of aggregate amounts, based on actuals of the most recently closed UCRFS ledgers, as a starting point. You will be able to manually modify, add, or manipulate future projections to reflect their anticipated plan for the fiscal year.

**Step 1:** Using the drill down menu, on the left hand side, select the Division, Department, or Activity that needs a projection entered.

**Step 2:** Select Non-Salary from the Projections drop down menu
Step 3: Click on Add Projection on the non-salary projections management screen.

![Image of the non-salary projections management screen]

Step 4: Fill in the fields and add the appropriate comments.

![Image of the projection input interface]

Tip: User projected fields, are overridden with actuals, as UCR RS is updated on a monthly basis. If you are unsure of when to expect a projection to happen, you can enter it in the month of June, so that your projections are not overridden. You will have to manually go back and delete that projection once it has happened.

Tip: The comments section is intended to be used at the discretion of the Analyst, however, please keep in mind that the comments entered will provide the descriptions that are rolled up into the Inquirer or Department Head role. It is best to be as descriptive as possible.
Step 5: Click Save and Verify. A Save Changes Result box will appear once you have successfully added a projection.

To verify that your projection was added in the correct FAU, simply go back to the employee projection management screen and verify that your entry is there. All changes and additions are highlighted in orange.

Tip: You can enter multiple budget projections for the exact same FAU. You can choose to project by individual item or group multiple items into one projection entry.
How to Edit an Existing Non-Salary Projection:
The non-salary projections are intended to be used as a modeling of future non-salary expenses. UCR RS, will automatically populate a projection of aggregate amounts, based on actuals of the most recently closed UCRFS ledgers, as a starting point. You will be able to manually modify, add, or manipulate future projections to reflect their anticipated plan for the fiscal year.

**Step 1:** Using the drill down menu, on the left hand side, select the Division, Department, or Activity that needs a projection entered.

**Step 2:** Select Non-Salary from the Projections drop down menu
Step 3: Click on the pencil icon, next to the entry you want to edit

Step 4: Fill in each month’s field with the difference in total expense. The system will update the sum of monthly projections (system calculated projections + user projections), and will give you a total monthly projection in the Sum of Monthly Projections row.
*Note: There are two options intended to help the Analyst, Zero Out Projections and Reset Projections. By clicking on Zero Out Projections, the system will create an entry, in the User Projections row, to make the total projections zero. By clicking on Reset Projections, the system will delete the entries, in the User Projections row.

Tip: User projected fields, are overridden with actuals, as UCR RS is updated on a monthly basis. If you are unsure of when to expect a projection to happen, you can enter it in the month of June, so that your projections are not overridden. You will have to manually go back and delete that projection once it has happened.

Tip: The comments section is intended to be used at the discretion of the Analyst, however, please keep in mind that the comments entered will provide the descriptions that are rolled up into the Inquirer or Department Head role. It is best to be as descriptive as possible.

Step 5: Click Save and Verify. A Save Changes Result box will appear once you have successfully added a projection.
To verify that your projection was added in the correct FAU, simply go back to the employee projection management screen and verify that your entry is there. All changes and additions are highlighted in orange.
How to Enter a Budget Projection:
The budget projections are intended to be used as a modeling of future budgetary adjustments. UCR RS, will not automatically populate any system generated projections. You will have to manually modify, add, or manipulate future projections to reflect the anticipated plan for the fiscal year.

**Step 1:** Using the drill down menu, on the left hand side, select the Division, Department, or Activity that needs a projection entered.

**Step 2:** Select Budget from the Projection drop down menu

**Step 3:** Click on Add Projection on the budget projection management screen
Step 4: Fill in the fields and add the appropriate comments.

Tip: User projected fields, are overridden with actuals, as UCR RS is updated on a monthly basis. If you are unsure of when to expect a projection to happen, you can enter it in the month of June, so that your projections are not overridden. You will have to manually go back and delete that projection once it has happened.

Tip: The comments section is intended to be used at the discretion of the Analyst, however, please keep in mind that the comments entered will provide the descriptions that are rolled up into the Inquirer or Department Head role. It is best to be as descriptive as possible.
Step 5: Click Save and Verify. A Save Changes Result box will appear once you have successfully added a projection.

NOTE: A saved budget projection DOES NOT show up as an orange line, you will need to manually verify it has been saved.

Tip: You can enter multiple budget projections for the exact same FAU. You can choose to project by individual item or group multiple items into one projection entry.
How to Edit an Existing Budget Projection:

The budget projections are intended to be used as a modeling of future budgetary adjustments. UCR RS, will not automatically populate any system generated projections. You will have to manually modify, add, or manipulate future projections to reflect the anticipated plan for the fiscal year.

**Step 1:** Using the drill down menu, on the left hand side, select the Division, Department, or Activity that needs a projection entered.

**Step 2:** Select Budget from the Projection drop down menu
Step 3: Click on the pencil icon, next to the entry you want to edit.

Step 4: Make the edits/updates and comments as needed.

Step 5: Click Save and Verify. A Save Changes Result box will appear once you have successfully added a projection.
NOTE: A saved budget projection **DOES NOT** show up as an orange line, you will need to manually verify it has been saved.

*Tip:* You can enter multiple budget projections for the exact same FAU. You can chose to project by individual item or group multiple items into one projection entry.
How to Enter a New Revenue Projection:
The revenue projections are intended to be used as a modeling of future revenue adjustments. UCR RS, will not automatically populate any system generated projections. You will have to manually modify, add, or manipulate future projections to reflect the anticipated plan for the fiscal year.

**Step 1:** Using the drill down menu, on the left hand side, select the Division, Department, or Activity that needs a projection entered.

**Step 2:** Select Revenue from the Projection drop down menu
Step 3: Click on Add Projection on the revenue projections management page

Step 4: Fill in the fields and add the appropriate comments.

Tip: User projected fields, are overridden with actuals, as UCR RS is updated on a monthly basis. If you are unsure of when to expect a projection to happen, you can enter it in the month of June, so that your projections are not overridden. You will have to manually go back and delete that projection once it has happened.

Tip: The comments section is intended to be used at the discretion of the Analyst, however, please keep in mind that the comments entered will provide the descriptions that are rolled up into the Inquirer or Department Head role. It is best to be as descriptive as possible.
Step 5: Click Save and Verify. A Save Changes Result box will appear once you have successfully added a projection.

To verify that your projection was added in the correct FAU, simply go back to the employee projection management screen and verify that your entry is there. All changes and additions are highlighted in orange.

Tip: You can enter multiple budget projections for the exact same FAU. You can choose to project by individual item or group multiple items into one projection entry.
How to Edit an Existing Revenue Projection:
The revenue projections are intended to be used as a modeling of future revenue adjustments. UCR RS, will not automatically populate any system generated projections. You will have to manually modify, add, or manipulate future projections to reflect the anticipated plan for the fiscal year.

Step 1: Using the drill down menu, on the left hand side, select the Division, Department, or Activity that needs a projection entered.

Step 2: Select Revenue from the Projection drop down menu

Step 3: Click on the pencil next to the revenue account you want to edit
Step 4: Fill in each month's field with the difference in total revenue. The system will update the sum of monthly projections (system calculated projections + user projections), and will give you a total monthly projection in the Sum of Monthly Projections row.

*Note: There are two options intended to help the Analyst, Zero Out Projections and Reset Projections. By clicking on Zero Out Projections, the system will create an entry, in the User Projections row, to make the total projections zero. By clicking on Reset Projections, the system will delete the entries, in the User Projections row.

Tip: User projected fields, are overridden with actuals, as UCR RS is updated on a monthly basis. If you are unsure of when to expect a projection to happen, you can enter it in the month of June, so that your projections are not overridden. You will have to manually go back and delete that projection once it has happened.

Tip: The comments section is intended to be used at the discretion of the Analyst, however, please keep in mind that the comments entered will provide the descriptions that are rolled up into the Inquirer or Department Head role. It is best to be as descriptive as possible.

Step 5: Click Save and Verify. A Save Changes Result box will appear once you have successfully added a projection.
To verify that your projection was added in the correct FAU, simply go back to the employee projection management screen and verify that your entry is there. All changes and additions are highlighted in orange.