



THE UNIVERSITY OF ALABAMA®

WHERE LEGENDS ARE MADE

IBM TM1 Review

(May hear called IBM PA in future)



WHERE LEGENDS ARE MADE

TM1 - Access

- Users need to link through myBama to access TM1.
 - Employee Tab
 - Administrative Systems
 - OLD TM1 – DO NOT USE THIS YEAR - Budget Preparation
 - NEW TM1 - New TM1 (IBM Planning Analytics)
 - » Must access through myBama and via Campus VPN if remote. TM1 will require login after this link, use myBama credentials, and select Native authentication
- Linking through myBama will allow the necessary authentication for the reporting function of TM1.



TM1 - Access

Administrative Systems

Enterprise Systems

- Banner 9 Administrative Pages
- Banner Workflow
- Banner Test Links
- Everest - K2 Workflow
- ARGOS Web Viewer
- ARGOS Desktop Client
- Eprint CAS authentication
- Banner 9 Recertification Application
- UA Imaging System - OnBase
- UA-Box
- Talisma - CCS Non-Credit

Academics, Admissions and Scholarships

- ASAS - Alabama's Scholarship Awarding System
- Faculty Photo Listing
- ORS Administrative Application
- UA Room Scheduling System
- Scholarship Application Administration
- University Registrar Administrative Applications
- Bb Learn Admin Section Maintenance
- Graduate Administrative Services
- Graduate Student Forms - Docusign
- Graduate Application Reader

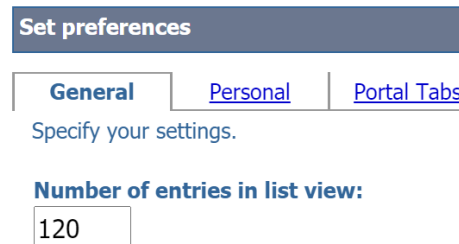
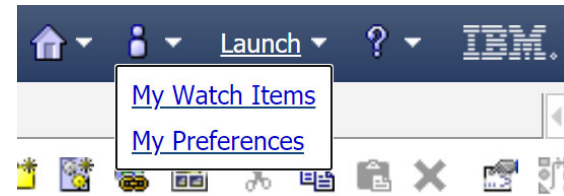
Finance and Human Resources

- Budget Preparation
- New TM1 (IBM Planning Analytics)
- HR Online Employment System
- UA-eTime Administrative System
- Work Location Application

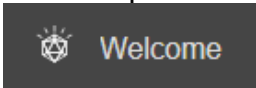



TM1 - Preferences

- If new user to TM1, you will want to update preferences to increase line item view.
- On the top of the screen you should see icon that looks like a person – select My Preferences
- You will want to set the Number of entries in list view: to 120.


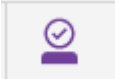


TM1 - Application

- TM1 / IBM PA
 - Consist of Workspace & Application
 - In Workspace will utilize Welcome at top center of page to return to folder home
 - 
 - In Workspace will utilize Shared on left of page to return home where Report and Application Folders can be found
 - 
 - Budget Preparation Applications Folder
 - Report Folder
- Budget Preparation Applications Folder
 - UA Permanent Budget
 - Will contain your orgs with permanent budgets
 - UA Realtime Recon Report
 - Recon report that takes the current days activity into effect
 - Be careful, as this recon looks like application but only has 1 tab
- Report Folder
 - Daily Report
 - Annotation Report
 - Reconciliation Report
 - Referred to as Overnight Recon, preferred reconciliation over Realtime

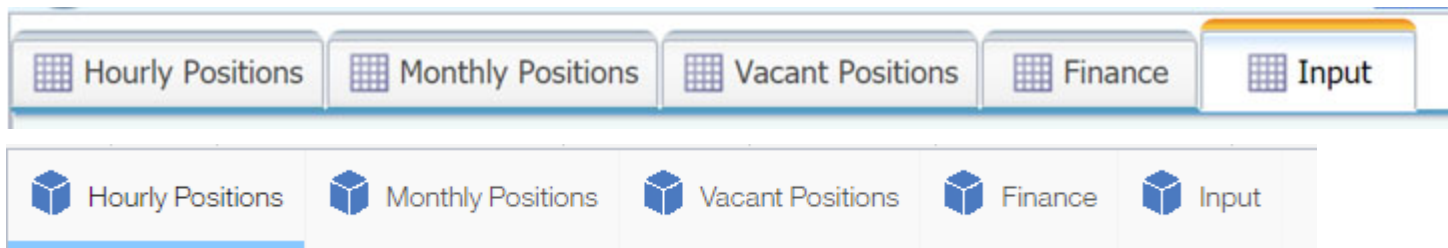


TM1 – Application (Ownership)

- To work on Org Budget you will need to take ownership
 - Select this icon on top of page to take ownership
Old Icon  New Icon 
 - NOTE, When taking ownership, always use same level.
 - If you use “All” then use “All” every time.
 - If you use Org by Org, then go Org by Org every time. (Preferred Method)

TM1 – Application (Tabs)

- There are Five tabs within the application
 - Hourly Positions
 - Monthly Positions
 - Vacant Positions
 - Finance
 - Input



TM1 – Application (Tabs)

- Input Tab

The screenshot displays the 'Input' tab in a TM1 application. The interface includes a navigation bar with tabs for 'Hourly Positions', 'Monthly Positions', 'Vacant Positions', 'Finance', and 'Input'. Below the navigation bar, there are two dropdown menus: 'Rows:' with 'Input Row [UA_User_Input_New]' and 'Columns:' with 'Data Entry [UA_M_User_Inputs_New]'. The main area is a data grid with the following columns: SOURCE, Org, COA, Fund, Account, Prog, Position, Position Title, Suffix, CWID, E Class, Last Name, First Name, and Completion. The grid contains 20 rows of data, with rows N_011 through N_020 shaded grey.

	SOURCE	Org	COA	Fund	Account	Prog	Position	Position Title	Suffix	CWID	E Class	Last Name	First Name	Completion
N_001	HOURLY	204101												
N_002	HOURLY	204101												
N_003	HOURLY	204101												
N_004	HOURLY	204101												
N_005	HOURLY	204101												
N_006	MONTHLY	204101												
N_007	MONTHLY	204101												
N_008	MONTHLY	204101												
N_009	MONTHLY	204101												
N_010	MONTHLY	204101												
N_011	VACANT	204101												
N_012	VACANT	204101												
N_013	VACANT	204101												
N_014	VACANT	204101												
N_015	VACANT	204101												
N_016	FINANCE	204101												
N_017	FINANCE	204101												
N_018	FINANCE	204101												
N_019	FINANCE	204101												
N_020	FINANCE	204101												



TM1 – Application (Tabs)

- Input Tab

	SOURCE	Org	COA	Fund	Account	Prog	Position	Position Title	Suffix	CWD	E Class	Last Name	First Name	Completion
N_001	HOURLY	200001												
N_002	HOURLY	200001												
N_003	HOURLY	200001												
N_004	HOURLY	200001												
N_005	HOURLY	200001												
N_006	MONTHLY	200001												
N_007	MONTHLY	200001												
N_008	MONTHLY	200001												
N_009	MONTHLY	200001												
N_010	MONTHLY	200001												
N_011	VACANT	200001												
N_012	VACANT	200001												
N_013	VACANT	200001												
N_014	VACANT	200001												
N_015	VACANT	200001												
N_016	FINANCE	200001												
N_017	FINANCE	200001												
N_018	FINANCE	200001												
N_019	FINANCE	200001												
N_020	FINANCE	200001												



TM1 – Application (Tabs)

- Input Tab
 - Budget Office suggests user tab over instead of hitting enter.
 - When user presses enter the system does calculations.
 - If all information is not being entered, mark information incomplete so when commit button selected incomplete info is not transferred over
 - CWID is only field that cannot be edited/deleted when transferred from Input to respective tabs.
 - Either do not key in an employee without the CWID or mark that line “incomplete” before committing anything.
 - Be sure you use the appropriate line for the corresponding tab.
 - Hourly for Hourly, Monthly for Monthly, Vacant for Vacant, Finance for Finance
 - Will get input error if put in an hourly e-class or account code on monthly line and vice-versa
 - Have to mark data complete AND commit for it to transfer from input tab.
 - Once info has been moved to the respective tab
 - Update the FTE
 - Dist. %
 - Salary
 - Transfer budget from another source.



TM1 – Application (Comments)

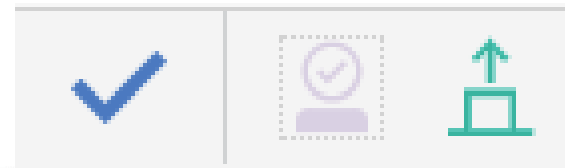
- Comments
 - Comments are what appear on the Annotation report for future reference
 - Only certain fields comments can be made to flow to Annotation Report
 - Position
 - Allocations
 - Transfer
 - Do not put comments on the input tab, they do not transfer over
 - Do not put comments on the Input tab, they do not transfer to Annotation Report



TM1 – Application (Saving Data)

- Green Data – the data is not saved anywhere
- Blue Data – the data is saved on your local machine only. After hitting enter the data will turn blue, TM1 will run calculations and save.
- Black Data – the data is saved to server, and viewable by all with security access to data. This occurs when the user commits the data.

To Commit select Arrow:



TM1 – Application (Clean-Up)

- Clean-Up
 - Update Alphabet Soup (DNUCPAO)
 - Continuing - for those here on March 31 and will still be here on October 1, eligible for raise
 - New - not eligible for a raise (already updated in TM1)
 - Remove - this is used to remove LINE completely - zero out the FTE, budget and salary
 - Vacant - this is used to maintain position with no one in it - zero salary keep FTE & budget
 - Promotion – New Promo05 and Promo10
 - Remove old position, and add new position with current base salary
 - Automatically calculates a 10% increase
 - Will require an EPA since Title Change
 - Admin Increment – account code ending in 5 no matter the fund type (already updated in TM1)
 - Correct Salaries and Budgets, Smoothing Errors
 - Salary should equal budget
 - Use the Adj dist-sal column, do not adjust budget
 - Do not use the smoothing adj column during clean up
 - Smoothing Error adjust both Salary and Budget, used only during raise process
 - Smoothing in clean up would only be used for a faculty promotion
 - » (smoothing adjustment for raises only)
 - Deleting employee
 - Zero out FTE
 - Remove Salary
 - If transferring position to vacant tab, copy and paste over to input tab. Move budget via the TRANSFER column.
 - Enter FTEs on vacant tab
 - download as 0.000
 - do not enter at more than 3 decimal places



TM1 – Application (Check List)

- Going through the check list will tell you what needs to be cleaned-up
- Download Overnight Reconciliation
 - Make sure totals are correct
 - Transfer column = 0
 - Check for smoothing errors, divisible by 9 or 12 (will say so in check salary rate column).
 - Verify splits = 100% and are smooth (divisible by 9 or 12)
 - If changing split percentages then be sure to make current lines “Remove” and add new
 - Making sure Budget = Salary
 - Add new column
 - Subtract New Budget from New Adj Salary
 - all filled positions should be zero
 - subtracting Salary from Budget will show vacant pos. w/ negative budgets
 - Vacant or pooled positions should have a positive amount
 - There should never be a negative



TM1 – Application (Raises)

- Raise eligibility date is March 31.
- Use Annual adjustment raise driver for both hourly & monthly.
 - Then enter in the annual increase in the raise input column.
 - This will automatically update salary AND budget.
 - Smoothing error occurs.
 - This is when you will use smoothing adj column



TM1 – Application (Equity / Rating)

- Equity Allocation Column
 - This will be for informational purposes.
 - The full salary increase including equity will still be entered via raise driver column
 - New Equity Allocation column does not flow to any formula in TM1.
 - Can take Overnight Recon and use Equity Allocation Column for reporting and back this amount out of raise total to calculate merit portion.
- Evaluation Rating
 - This will be for informational purposes.
 - Unacceptable
 - Needs Improvement
 - Meets Expectations
 - Exceeds Expectations



TM1 – Application (Submitting)

- When done updating TM1 and ready to Submit, select icon with White Up Arrow in Green Circle



- OAA - Notify Jordan Johnson
- F&O – Notify Budget Office



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