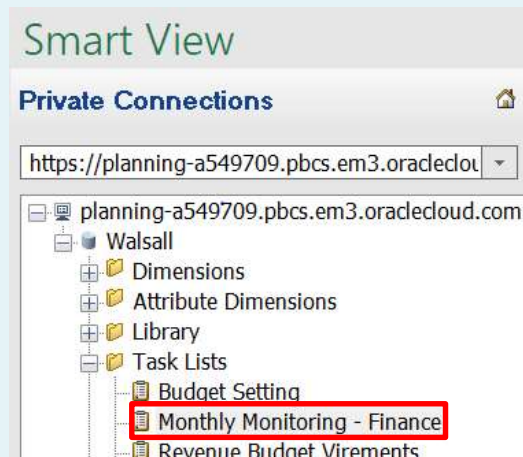


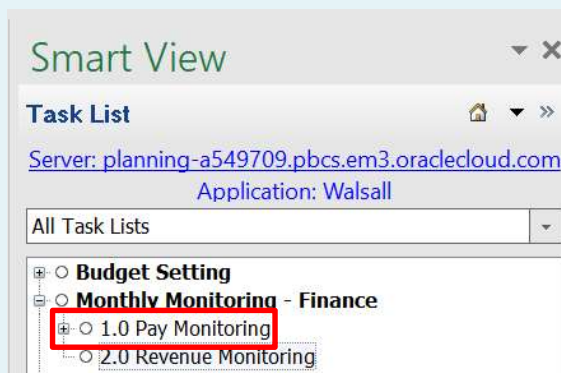
# Pay Monitoring

1

1. Once you have signed into PBCS via Smart View you can access the Pay Monitoring Form by clicking the **Walsall- Task Lists- Monthly Monitoring Finance** as shown below:

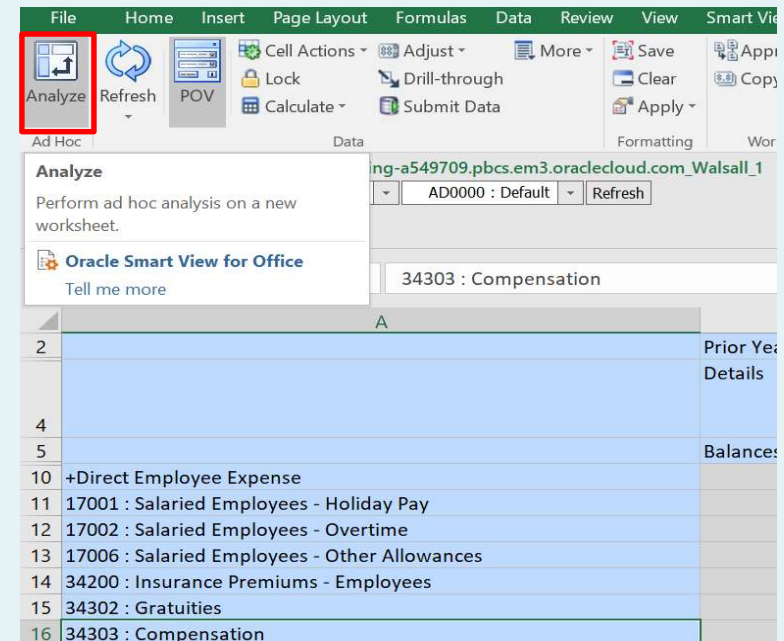


2. Click on **Pay Monitoring** to open the form. This is the form you would use to do your monthly salary forecasting.



2

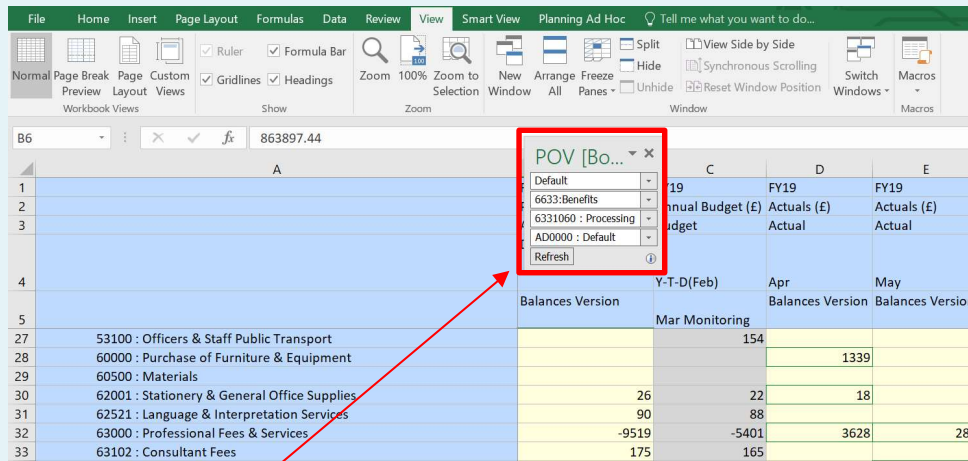
3. The Pay Monitoring Form will open in Smart View form first. To input information at multiple cost centre level, click **Analyze** located in the planning ribbon to open the form in ad-hoc



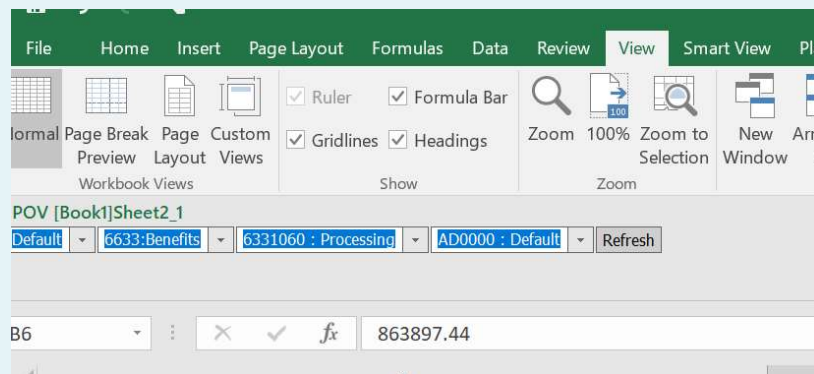
# Pay Monitoring

3

4. The form will open up and look like this



5. Drag the **POV** box underneath the Smart View Ribbon so it looks like the image below



4

6. You are now ready to use your **Ad-Hoc Grid for Pay monitoring**.

7. Remove columns **N-AC** to leave the Ad-Hoc grid you require.

The Ad-hoc Grid should look like the image(s) below:

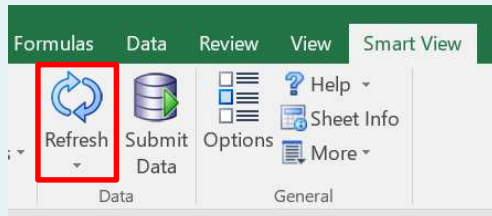
|    | F              | G                        | H              | I                 | J                       | K              | L              | M                        | N                  |           |
|----|----------------|--------------------------|----------------|-------------------|-------------------------|----------------|----------------|--------------------------|--------------------|-----------|
| 1  | Forecast       | Forecast                 | Forecast       | Forecast          | Forecast                | Forecast       | Forecast       | Forecast                 | Actual             | Forecast  |
| 2  | Mar Monitoring | Mar Monitoring           | Mar Monitoring | Mar Monitoring    | Mar Monitoring          | Mar Monitoring | Mar Monitoring | Mar Monitoring           | Balances Version   | Mar Monit |
| 3  | Details        | Details                  | Details        | Details           | Details                 | Details        | Details        | Details                  | YearTotal          | Details   |
| 4  | Current Grade  | Prev Years' Spinal Point | FTE            | Weekly Post Hours | Weekly Contracted Hours | Start Month    | End Month      | Remaining months in post | Salary Actuals (£) | Manager's |
| 5  | G13            | 050                      | 1              | 37                | 37                      | Mar            |                | 1                        | 62980              |           |
| 6  |                |                          |                |                   |                         |                |                |                          | 27829              |           |
| 7  | G16            | 062                      | 1              | 37                | 37                      | Mar            |                | 1                        | 93217              |           |
| 8  | G11            | 043                      | 1              | 37                | 37                      | Mar            |                | 1                        | 53501              |           |
| 9  |                |                          | 3              |                   |                         |                |                |                          | 237528             |           |
| 10 |                |                          | 3              |                   |                         |                |                |                          | 237528             |           |

|    | O                         | P                   | Q                           | R              |
|----|---------------------------|---------------------|-----------------------------|----------------|
| 1  | Forecast                  | Forecast            | Actual                      | Forecast       |
| 2  | Mar Monitoring            | Mar Monitoring      | Balances Version            | Mar Monitoring |
| 3  | Details                   | Details             | Feb                         | Details        |
| 4  | Manager's Adjustments (£) | Final Forecast. (£) | Salary Budget post Virement | Comments.      |
| 5  |                           | 68706               | 52962                       |                |
| 6  |                           |                     |                             |                |
| 7  |                           | 101691              | 77882                       |                |
| 8  |                           | 58365               | 45140                       |                |
| 9  |                           | 228762              | 175984                      |                |
| 10 |                           | 228762              | 175984                      |                |

## Pay Monitoring

5

15. Click **Refresh** in the Smart View Ribbon to get out of free from mode and ready to input data.



16. To bring your data in you need to select your **code combinations** by zooming in and out of the Service Type, Cost Centre and Additional. Please refer to the [Pay Monitoring Zoom in and Out Quick Reference Guide](#) to carry this out.

17.

| Z                  | AA                 | AB                 | AC                 | AD                 | AE                        |      |
|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------------|------|
| Actual             | Actual             | Actual             | Actual             | Actual             | Forecast                  | Fore |
| Balances Version   | Balances Version   | Balances Version   | Balances Version   | Balances Version   |                           |      |
|                    |                    |                    |                    |                    | Mar Monitoring            | Mar  |
|                    |                    |                    | Q4                 | YearTotal          | Details                   | Det  |
| Jan                | Feb                | Mar                |                    |                    |                           |      |
| Salary Actuals (£) | Salary Actuals (£) | Salary Actuals (£) | Salary Actuals (£) | Salary Actuals (£) | Manager's Adjustments (£) | Fina |
| 5725               | 5725               |                    | 11451              | 62980              |                           |      |
|                    |                    |                    |                    | 27829              |                           |      |
| 8474               | 8474               |                    | 16949              | 93217              |                           |      |
| 4864               | 4864               |                    | 9727               | 53501              |                           |      |
| 19064              | 19064              |                    | 38127              | 237528             |                           |      |
| 19064              | 19064              |                    | 38127              | 237528             |                           |      |

18.

Once you have brought your data into the form at the bottom level, the columns you can **enter information into will appear as yellow**. You can only make changes in the **YELLOW** cells.

You are able to add funds in the current year by adding to Column AE **Manager's Adjustments**.

6

12. Once you have made adjustments to forecast, click '**Submit Data**' to save changes.

|    | Z                  | AA                 | AB                 | AC                 | AD                 | AE                        | AF                 | AG                          | AH             |
|----|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------------|--------------------|-----------------------------|----------------|
| 1  | Actual             | Actual             | Actual             | Actual             | Actual             | Forecast                  | Forecast           | Actual                      | Forecast       |
| 2  | Balances Version   | Balances Version   | Balances Version   | Balances Version   | Balances Version   | Mar Monitoring            | Mar Monitoring     | Balances Version            | Mar Monitoring |
| 3  |                    |                    |                    | Q4                 | YearTotal          | Details                   | Details            |                             | Details        |
| 4  | Jan                | Feb                | Mar                |                    |                    | Manager's Adjustments (£) | Final Forecast (£) | Feb                         | Comments.      |
| 5  | Salary Actuals (£) | Salary Actuals (£) | Salary Actuals (£) | Salary Actuals (£) | Salary Actuals (£) |                           |                    | Salary Budget post Virement |                |
| 6  | 5725               | 5725               |                    | 11451              | 62980              |                           | 68706              |                             | 52962          |
| 7  |                    |                    |                    |                    | 27829              |                           |                    |                             |                |
| 8  | 8474               | 8474               |                    | 16949              | 93217              |                           | 101691             |                             | 77882          |
| 9  | 4864               | 4864               |                    | 9727               | 53501              |                           | 58365              |                             | 45140          |
| 10 | 19064              | 19064              |                    | 38127              | 237528             |                           | 228762             |                             | 175984         |
| 11 | 19064              | 19064              |                    | 38127              | 237528             |                           | 228762             |                             | 175984         |

13. Once changes are submitted you will need to run a rule to update the forecast calculations. (Please refer to [Pay Monitoring Business Rule](#) guide)

14. Click Refresh once the rule has been run successfully to see the forecast calculations updated.

**PLEASE NOTE:** ANY DIRECT EMPLOYEE SUBJECTIVES CANNOT BE UPDATED IN REVENUE MONITORING. THESE CHANGES WILL NEED TO BE MADE IN THE PAY MONITORING FORM. ALL PAY INFORMATION IS PULLED DIRECTLY FROM THE HR/PAYROLL SYSTEM.

Further Support If you have any further queries, please contact the **One Source helpdesk** on **01922 654320**.