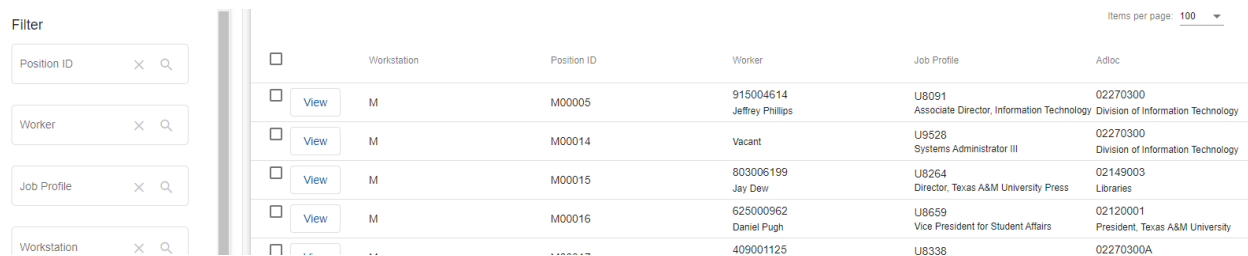# Position Budgeting Application (PBA) FY22

Access

Access to the PBA is via SSO and driven by adloc. Once logged into SSO you should see Position Budgeting in the SSO menu if you have access. If you do not see Position Budgeting listed and need to request access, please contact the budget office at budget@ag.tamu.edu.

Upload to PBA

Your departmental salary recommendations template will be used to upload the merit, equity and promotion % increases into the PBA. All other changes such as term, costing allocations, work period or modification to current year salary, must all be handled by directly entering the data into the PBA.

Position Update

Upon entering the PBA you will see a screen layout similar to the one shown below. Only those positions in the adloc you are assigned should appear. The filter box to the left will allow you to filter on a host of items by choosing the filter prompt and clicking apply.

Once a particular position is selected, the screen below reflects the categories that can be updated. Along the left side you have several icons. The suitcase will lead you back to the view below.

The second icon which looks like a block C or odd shaped pie is where you may do most of the data input. In this particular view, you will be able to change the costing allocation, % effort, work period, current pay rate, merit, additional and promotion rates. **Note that FY 22 merit/equity and promote salary changes will be uploaded to the PBA via CSV file and should not be changed in the PBA.**

The triangle icon will show you the change history for the position since the PBA was loaded on May 12, 2021. The X will take you all the way back to the initial view.

The work period, percent effort and current pay rate may all be changed in this view. Please note, changes to the work period, % effort or modifications to the pay type or pay rate will **only change the calculations feeding into the budget reports**. These changes made in the PBA **will not** be fed to Workday and any changes needed to these position details must also handled directly through a

Position Details

Work Period

Work Period *

12 month(s) (9/1 - 8/31)

Percent Effort

100   %

Pay $131,365.44
Annual   with adjustment

Current

$131,365.44

Pay $10,947.12
Monthly   with adjustment

Pay Rate Type *

Salaried

Pay Rate *

$10947.12   /mo

FTE rate

Workday action.   The adjustment fields will be populated when the unit salary change template is uploaded . If additional changes are needed, submit

an email to the budget office at *budget@ag.tamu.edu* with cc to department or unit head indicating approval for the change..

Modifying Costing Allocations

Costing allocations should be modified to reflect the account the position should be budgeted on. To modify the costing allocation, use the C or pie icon on the left to view current allocation. You will see the screen below.
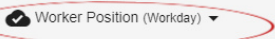

The Worker Position (Workday) circled below is defaulted to feed to workday. If you need to modify the position to be budgeted on one account but would like the position to remain as it is in Workday on 8/31/21, you may click the arrow and choose "exclude". Only costing allocations that have been updated in the PBA will feed to Workday at the end of August.

To modify or delete an iteration, use the tools circled in red. You can add (+), edit (pencil), duplicate, return to original iteration or delete the iteration using these tools. The last iteration in an interval must have an open end date to be accepted.

Annual Pay
$319,599.12 $319,599.12
Current   With adjustment

Allocated Pay
$319,599.12
With adjustment

9/1/2020 - (Open)

Cost Center ID	Distribution Percent	Amount	Adjusted Amount	+
02-120405-00000	04.95%	$15,820.16	$15,820.16	✏ 🗑
02-237092-00000	42.00%	$134,231.63	$134,231.63	✏ 🗑
02-302520-00000	53.05%	$169,547.33	$169,547.33	✏ 🗑
Total	100.00%	$319,599.12	$319,599.12	

To add, modify or delete a cost center within an iteration, the icons to the right will be used.   The distribution must add up to 100% before it will be accepted.

Annual Pay
$319,599.12 $319,599.12
Current   With adjustment

Allocated Pay
$319,599.12
With adjustment

9/1/2020 - (Open)

Cost Center ID	Distribution Percent	Amount	Adjusted Amount	+
02-120405-00000	04.95%	$15,820.16	$15,820.16	✏ 🗑
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Total	100.00%	$319,599.12	$319,599.12	

Be sure to choose the SAVE button in the top right corner once you have successfully made the costing allocation changes.

Vacating a Position

To vacate a position, you simply choose the Worker tab as shown below and choose "vacate". The position will reflect vacant in your reports but, **please note, this will not vacate the position in Workday.** An action will need to be routed in workday as required to vacate the position. Again, you must save for the action to be recorded in the PBA.

Worker

UIN: ████████████

Name: J████████████

✏ Edit　　👤 Vacate

Filling a Vacant Position

If someone was hired into a vacant position after the May 12th PBA data load, you may add the current employee to the PBA file. Choose the vacant position, select the worker tab and choose edit. A "worker search" box will be displayed. Begin typing first, last name or UIN and if the employee has a valid UIN they can be chosen.

Worker Search

Worker

janac　　✕　🔍

602000141 (James Janac)

Because vacant positions are not considered primary jobs in Workday, you must also now mark this position as primary for it to feed into the budget reports. Click the suitcase icon on the left and then choose the general tab. The box next to primary job will need to be checked. Be sure to save

Adding a Position

If you have received approval for a new position which has been created in Workday since May 12th, it may also be populated to the PBA. In the main view above the filters you will find +Add Position. Upon clicking you will be prompted to provide the details of the position.

EIB Upload to Workday Merit

The data uploaded into the PBA for merit, additional/equity or promotion increase will be automatically uploaded into Workday Merit. The Workday Merit module process will be centrally managed by the budget office (no merit tasks to units)