

Position Budgeting Application (PBA) FY23

Access

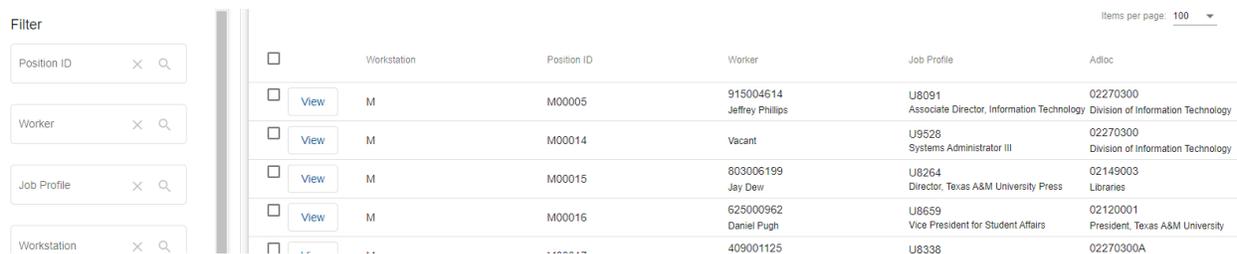
Access to the PBA is via SSO and driven by adloc. Once logged into SSO you should see Position Budgeting in the SSO menu if you have access. If you do not see Position Budgeting listed and need to request access, please contact the budget office at budget@ag.tamu.edu.

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.



The screenshot shows the PBA main interface. On the left is a 'Filter' sidebar with four search boxes: 'Position ID', 'Worker', 'Job Profile', and 'Workstation'. The main area is a table with columns: 'Workstation', 'Position ID', 'Worker', 'Job Profile', and 'Adloc'. Each row has a 'View' button. The table contains five rows of data.

Workstation	Position ID	Worker	Job Profile	Adloc
M	M00005	915004614 Jeffrey Phillips	U8091 Associate Director, Information Technology	02270300 Division of Information Technology
M	M00014	Vacant	U9528 Systems Administrator III	02270300 Division of Information Technology
M	M00015	803006199 Jay Dew	U8264 Director, Texas A&M University Press	02149003 Libraries
M	M00016	625000962 Daniel Pugh	U8659 Vice President for Student Affairs	02120001 President, Texas A&M University
..	..	409001125	U8338	02270300A

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 screenshot shows the details view for position M00005 - 915004614 (Jeffrey Phillips). The left sidebar has four icons: a suitcase, a block C shape, a triangle, and an X. The main area is titled 'Details' and contains four sections: 'General' (General position info), 'Compensation' (Pay and adjustments), 'Worker' (915004614 Jeffrey Phillips), and 'Job Profile' (U8091 Associate Director, Information Technology).

M00005 - 915004614 (Jeffrey Phillips)	
General	General position info
Compensation	Pay and adjustments
Worker	915004614 Jeffrey Phillips
Job Profile	U8091 Associate Director, Information Technology

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 23 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 19, 2022. 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 be handled directly through a

Position Details

Work Period ^

Work Period *
12 month(s) (9/1 - 8/31) v

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 v

Pay Rate *
\$10947.12 /mo

FTE rate

Workday action.

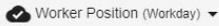
The adjustment fields will be populated when the unit salary recommendation template is uploaded. If additional changes are

The adjustment fields will be

needed, the revised template 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.

Costing 

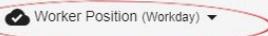
Annual Pay		Allocated Pay	
\$131,365.44	\$131,365.44	\$131,365.44	\$131,365.44
Current	With adjustment	With adjustment	With adjustment

9/1/2020 - (Open)

+    

Cost Center ID	Distribution Percent	Amount	Adjusted Amount	
02-270300-09000	100.00%	\$131,365.44	\$131,365.44	
Total	100.00%	\$131,365.44	\$131,365.44	

The Worker Position (Workday) circled below is defaulted to feed to workday. If you do not want the cost allocation to feed to Workday, you may click the arrow and choose “exclude”. **Only costing allocations that have been updated in the PBA -and noted to feed- will update to Workday at the end of August.**

Costing 

Annual Pay		Allocated Pay	
\$131,365.44	\$131,365.44	\$131,365.44	\$131,365.44
Current	With adjustment	With adjustment	With adjustment

9/1/2020 - (Open)

+    

Cost Center ID	Distribution Percent	Amount	Adjusted Amount	
02-270300-09000	100.00%	\$131,365.44	\$131,365.44	
Total	100.00%	\$131,365.44	\$131,365.44	

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		Allocated Pay	
\$319,599.12	\$319,599.12	\$319,599.12	\$319,599.12
Current	With adjustment	With adjustment	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		Allocated Pay	
\$319,599.12	\$319,599.12	\$319,599.12	\$319,599.12
Current	With adjustment	With adjustment	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	

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:



Edit



Vacate

Filling a Vacant Position

If someone was hired into a vacant position after the May 19th 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

 ✕ 🔍

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

Position ID
M00014

Workstation *
M

Employee Type *
Staff

Adloc *
02270300

Work Period *
12 month(s) (9/1 - 8/31)

Percent Effort *
100 %

Include in budget

Primary Job



**Check Primary Job
Box Upon Filling
Vacant Position**

A filled position with "Primary Job" unchecked means it is considered secondary.

Adding a Position

If you have received approval for a new position which has been created in Workday since May 19th, 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)