






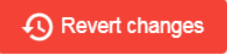
QUICK REFERENCE/BEST PRACTICES POSITION BUDGETING APPLICATION (PBA)

ACCESS	Under SSO menu "Position Budgeting Application"
	Access is granted via unit head approved Statement of Responsibility
	Access is based on adloc and Workstation
	Application works optimally in Chrome or Firefox browsers
DATA	Initial data set of positions/cost allocations imported from Workday on May 13, 2020.
	All budgeted positions- Configuration choices by Member impact positions imported
	06/07 -Graduate, Adjunct, Vacant and Secondary positions will be imported to PBA, but will not feed to 901s/budget
	Costing allocations in PBA -based on the last open interval listed for worker position in WD. Cost allocation start date defaults to 9/1/2020 in PBA
	If no worker costing allocations exist, or if a gap in intervals exists, costing allocation will default to AGENCY DEFAULT account. Agency default account CANNOT be used in budget **costing allocations MUST be corrected in PBA by unit
	Vacant positions in PBA have a position restriction costing allocation (if there are no position restrictions, agency default will populate) ** Highly recommend review of all position restrictions on vacant positions- grant accounts are not recommended for position restrictions- edit to use unit designated or project zero account- <i>these edits will feed to workday</i>

<p>LAYOUT AND NAVIGATION</p>	<p>Filter bar - Filter available on Position ID (Pin), Worker (Name or UIN), Job Profile, Workstation, Adloc, Status (Filled or Vacant), New position, Primary Position, Employee Type (Graduate Assistant, Faculty or Staff), TRS Job Category (not relevant to most positions), Included in Budget and Last Modified (with selected date range). To filter, select section- enter criteria and Click "apply" button at bottom of filter column. To Clear all filters, click "Clear". Can filter multiple areas at one time; can add multiple items to one filter section</p> <p>Filter section can be hidden by clicking "Hide filter" button on on bar</p> <p>Main data section includes Workstation, Position ID (PIN), Worker (UIN and name), Job Profile (position number and name), Adloc (number and name) and Date last modified. Columns are sortable by clicking arrow to right of column heading.</p> <p>100 items are displayed per page- use arrows on top bar to move to next page. Download of data NOT currently available- on roadmap for next year</p>
<p>POSITION DETAIL UPDATES</p> <div data-bbox="241 646 325 714" style="text-align: center;">  </div> <p><i>Used to modify current information to impact presentation in budget ONLY- will NOT impact information in Workday</i></p> <p><i>NOTE: if no changes to current position other than merit/addt'l /promote skip this section and use cost allocation section</i></p>	<p>To begin modifying a position, click on the </p> <p>Position detail section includes- "General", "Compensation", "Worker", and "Job Profile". Drop down arrows are selectable to the right of each heading, or you can click on each section to see details.</p> <p>GENERAL -used to update: Position ID (Pin), Workstation, Employee Type, Adloc, Work Period, Percent Effort, Include in Budget, and Primary Job. <i>Generally should NOT uncheck include in Budget</i></p> <p>COMPENSATION - used to update: Pay (Pay rate and pay type), Adjustments (Merit, Additional/Equity, Promotion effective 9/1 will be uploaded) NOTE- If employee receives increase after May 13 in Workday (and is effective for the current fiscal year)- <u>pay rate</u> must be adjusted in this section (PAY) to update CURRENT pay rate in PBA. E.g. a reclassification or promotion effective June 1.</p> <p>Annual and monthly/hourly rates will immediately update in PBA</p> <p>WORKER- used to transfer different employeee to position or vacate a position- the worker name/UIN is updated by selecting the "Edit" pencil. A search box will populate (can search by name or uin). The worker can be vacated by selecting the "Vacate" icon. When vacating, name/UIN will become blank.</p> <p>JOB PROFILE- used to reclass a pin- the Job Profile ID with description can be changed by selecting the "Edit" pencil. Search box will populate (can search by job id or title)</p> <p>The changes made in PBA for position do NOT feed to Workday. They will populate on the 901- default is "Include in budget" and "Primary Job". Part 06/07 master configuration excludes all Vacant, Graduate, Adjunct, Secondary positons from 901. Position changes made in Workday should be tracked and also made in PBA. <u>No changes</u> made in PBA will feed to workday EXCEPT cost allocations.</p>

<p>COSTING ALLOCATION UPDATES</p>	<p>Green cloud with checkmark will indicate if costing is to be submitted to workday.</p>
	<p>Submit to workday is default- to exclude, select drop down area and select "exclude". If you don't change and SAVE a new cost allocation- nothing will feed back to WD. Examples when unit may want to change a cost allocation for budget but NOT feed costing allocation to workday- want to budget person on E&G for 901 but do NOT want to override current cost allocations in WD that may include grant sources. NOTE- FAMIS encumbers the cost allocations in WD on 9/1</p>
<p><i>All costing allocations <u>changed & SAVED</u> in PBA will feed to workday with effective date 9/1/2020 and replace current WD costing allocations</i></p>	<p>Annual Pay sections -"Current" , "With adjustments" , and "Allocated ". Annual pay current imported from WD on May 13 or edited in Position details Pay section; With adjustments -new proposed pay with merit, additional/equity or promote that was uploaded from template. Allocated- total new proposed pay across funding sources *This information will also be visible to the right of the costing section and can be updated from this tab as well.</p>
	<p>Interval- Costing allocation imported from WD is based on the last open interval for worker position on the snapshot date (May 13, 2020)</p>
	<p>Costing allocation intervals will be listed by interval date, and can be navigated using the scroll bar</p>
	<p>Intervals can be modified using the following icons beneath the interval date</p>
	<p></p> <p>"+" to add new interval, pencil to edit interval dates, folder corner paper to duplicate interval, trash can to delete the interval (hover on icon for descriptions)</p>
	<p>Use icons on far right of each interval to edit cost allocations- + sign- add line, pencil-edit accounts on line and trash can-delete line</p>
	<p>Allocated pay- Interval distribution must total 100%. Allocated pay tracks interval totals to ensure 100% of salary for work period is accounted for.</p>
	<p>Intervals must be in date order and the last interval must be left open ended. Cannot SAVE if intervals don't = 100% each and total to annual salary</p>
	<p>To duplicate an interval, a specific set of steps should be followed:</p> <ol style="list-style-type: none"> 1. Edit accounts on the first interval 2. Duplicate 1st interval while it is still open ended (this is mandatory) 3. Edit 1st interval to establish it's end date 4. Edit start date on 2nd interval (leave it open ended if you plan to duplicate or a third interval) 5. Edit accounts on 2nd interval 6. Duplicate 2nd interval 7. Edit end date on 2nd interval 8. Edit start date on 3rd interval 9. Edit accounts on 3rd interval 10. 3rd interval should already be open ended so you're done 11. Save button should be highlighted and usable

QUICK REFERENCE/BEST PRACTICES POSITION BUDGETING APPLICATION (PBA)

<p>COSTING ALLOCATION UPDATES</p> <p><i>All costing allocations <u>changed & SAVED</u> in PBA will feed to workday with effective date 9/1/2020 and replace current WD costing allocations</i></p>	<p>Cost centers available to source are imported from Workday nightly. 06/07 accounts will reflect the appropriate Y variable (06 is 1YXXXX, 07 is 1xxxxx-2YXXX)</p> <p>Costing allocations CAN be modified and sent to Workday, even if the position is not feeding to budget (e.g. Vacant, Graduate and Secondary positions). We STRONGLY encourage departments to review position restrictions on <u>vacant</u> positions and to remove grant accounts, replacing with Project Zero or other unit accounts</p> <p>If errors exist on costing allocations, messages will populate and you will not be able to save. Once errors are cleared the save button will be blue and selectable.</p>
<p>HISTORY TAB</p> 	<p>History tab shows the date last modified with the UIN identifier. Visible by position, for both position and costing changes.</p> <p>Once any piece of data is changed and saved, an orange "Revert changes" button will populate in the history section. Select to revert all changes back to Workday load from May 13. (all history of changes is also removed)</p> 

QUICK REFERENCE/BEST PRACTICES POSITION BUDGETING APPLICATION (PBA)

CLOSE TAB (X)	Close tab closes out from individual position and returns you to main page/list.
ADD POSITION (ON NAVIGATION BAR AT TOP OF POSITIONS LIST)	Add position - only used to add a brand new Position (fill a vacant existing position using the Position Detail tab) + Add position
+ Add position	<p>Click +Add position. A "Details" section will appear, which requires the following information be entered- on the "General" tab- New Position ID, Workstation, Employee Tyle (Faculty, Staff or Graduate Assistant), Adloc, Work Period, Percent Effort. Checkboxes to select are " include in budget", "Primary Job" (defaults as yes), "Eligible for Longevity", "Exempt from OAH!" and "Exempt from OASDI" (the benefits boxes are ONLY for the purpose of estimating benefits).</p> <p>BEST PRACTICE - Create position in Workday FIRST- newly created pins will feed nightly to the PBA and will be searchable. (the pin will have the Workday format- e.g. P-XXXXX). Search and select for the new pin and add. (All other data needs to be entered for the new position- only the pin downloads from Workday)</p> <p>The PBA can create a pin (it will be PB-XXXXX), however, this pin is a placeholder for the 901 only and cost allocations on the placeholder pin will NOT feed to workday. You should NOT create a placeholder pin and then also budget the New WD pin when it flows to the PBA as this will result in duplication of positions for budgeting. Best practice is to create new pin in WD first and wait till it feeds to PBA to budget and assign cost allocation.</p> <p>Compensation tab -enter pay rate type and pay rate . (the options exist to enter merit, additional and promote but it's unlikely these would be used for new positions)</p> <p>Worker and Job profile sections should be completed in full.</p> <p>Once all data is entered, you will be able to save data on new position, and this position will become part of the data set for the 901. * There is no option to "Revert" or delete new pins after creation .</p>