The Position Budgeting Application
Agenda

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Position Budgeting Application Updates from FY20

- Unit templates populated with salary increases/recommendations will be uploaded to the PBA.
- All inclusive position budgeting tool. Allows changes to worker, title, work period, salary, and effort as well as costing allocations. Adds custom configuration to identify data feeding from Workday to PBA, and from PBA to 901’s, budget and back to Workday.
- Current data from Workday captured once on May 13
  - All active, budgeted positions (prior to summer position effective dates)
  - Data acts as a baseline for budgeting.
  - Costing allocation accounts in app are sourced from Workday
- Salary recommendations will be uploaded from PBA to Workday merit module.
Position Budgeting Application and Workday

- PBA will be used to create FY21 Goldplate budget
  - Data uploaded one time from Workday (snapshot date).
  - **Unit tracking is required for changes to positions after snapshot date to ensure that data in PBA and Workday align (e.g. transfers, new hires, compensation changes, vacates). This will require double entry in both systems to ensure the most accurate budget preparation and accounting data in FAMIS.** Reports comparing PBA and active Workday will be provided to units to assist.
  - Options in PBA to include (or not) positions in budget (subject to member configuration), as well as option to feed (or not feed) costing allocations to Workday. (Default is to include and feed)
  - Reconfigured to provide more filtering options, accurate audit history and 901 reports.
- Salary actions (merit, promote, equity) in PBA will be uploaded to Workday merit module.
Position Budgeting Application Best Practices

• Costing Allocations

• If no active worker or position restrictions exists in Workday at snapshot date, the agency default account will populate. i.e. any costing allocations in Workday with an end date of 8/31/2020 will populate in PBA on the agency default account. Any costing allocation “gaps” will also populate with the agency default account. These costing allocations must be updated/corrected in the PBA by the unit.

• The first interval must start 9/1/20 and the last costing allocation interval must be open ended. Project Zero accounts can be used for budgeting.

• For appointments with effective dates prior to 9/1 (e.g. 8/15-5/15), costing and 901 will account for both terms.

• Valid accounts as recognized in Workday will be available for costing, and will reflect 06 and 07 member variables (e.g. 06-1YXXXX and 07-129000-2Y000).

• All Extension federal accounts from FY 2020 MUST be updated in PBA using appropriate Extension federal account for FY 21.

• Costing allocations will default to feed to Workday, however, you can select to not feed. Costing allocations that have NOT been updated in the PBA will NOT feed to Workday.

• Extension and Research do not budget vacant positions however the PBA can be used to review, update and feed new positions restriction cost allocations to Workday (we highly encourage units to remove grant accounts in position restrictions and use project zero or other unit accounts).

• When fed to Workday (August 27 tentatively), costing allocations from the PBA will override existing costing for 9/1/20 on.
Position Budgeting Application Best Practices

- FY 21 Salary actions with merit/equity and promote salary changes should be uploaded via a CSV file to the PBA. Further edits can be done in the PBA if needed, with unit/dept head approval provided to budget@ag.tamu.edu for any changes.
  - Currently vacant positions can be filled in the app, and new positions can be created in the app. Best practice - create the position in Workday- then create new position in PBA using “Add position” tab. *New Position ID’s will feed from Workday to PBA nightly (it will be the P-XXXX format)
  - To duplicate a costing allocation interval, a specific order needs to be followed. See Quick Reference Guide.
  - Changes to a position/cost allocation must be saved (blue save button). If any errors exist, save will not appear. Once changes are saved, select “X Close tab” to exit position.
  - The “History” section will provide an audit by UIN of changes made to position, however, if the “revert changes” button is selected, the position and costing data will revert to the snapshot (and History will clear)
  - The application performs best in Chrome or Firefox browser. (Internet explorer is not recommended)
• Accessed through SSO

• Previously submitted SORs will remain in effect - submit new SORs for any changes

• Departmental update access to all adlocs (multiple workstations can be accessed in application if applicable) based on Statement of Responsibility submitted
Reminders/Important dates

• Units to track events from May 13\textsuperscript{th} (snapshot date) through July 30\textsuperscript{th} and enter in PBA. (to ensure Workday and PBA information is aligned)*Reports will be provided to units.

• PBA opens June 1- Closed July 30\textsuperscript{th}

• PBA recommendations will be uploaded to Workday Merit module.

• Workday Merit will be launched to the budget office. Reports will be provided to units.
Contacts

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