



Activating the Position on NBAPBUD

What you do...	Comments / Prompts
Direct Access NBAPBUD	POSITION BUDGET FORM
Enter <u>Fiscal Year</u> and <u>Position Number</u>	If leaving from NBAPOSN, Position Number and Date will default in and the <u>Employee Class</u> and <u>Position Title</u> will default when you tab.
Select Next>Block	Banner will default values: <ul style="list-style-type: none"> • <u>Status</u> = Inactive • <u>Type</u> = Single • <u>Begin Date</u> = today's date
Tab past the <u>Status</u> field.	This field automatically updates to Active status, once basic budget information has been entered and saved for the position. It does not need to be changed manually.
Review the <u>Type</u> field.	For status positions, leave value as "Single" If the position is complimentary (non-status) or budget only, change value to "Pooled" by clicking button with mouse.
Review <u>Position Effective Dates</u> .	<u>Begin Date</u> : enter the correct date on which the position begins. If the transaction reflects a position approved through classification, the date used should be the Monday after the Classification Committee meeting at which the change was approved. (For classification changes approved prior to the start of FY04, use a date of "07-Jul-2003".) <u>End Date</u> : should be blank except for TRM positions (Position Category "M")
Leave Budget Roll Rules as defaulted.	
Enter Budget Authorization ONLY if this is a CYA position	If the CYA position will be filled by an existing employee, enter their position number they will be 'on leave from' in this field OR 'EXTHIR' if position filled by a new external hire During conversion of positions from our legacy system to Banner, the Authorized By field on NBAPBUD was populated with the legacy position number.
Select Next>Block	POSITION SALARY BUDGETS



Banner: HR – Activate a New Position

What you do...	Comments / Prompts
Continued –	POSITION SALARY BUDGETS
Complete the <u>Fisc</u> field.	Enter the current fiscal year value, as a four-digit number (eg “2004”).
Tab to <u>Orgn</u> field.	Enter the desired organization code for the position. Note: This value will default into any subsequent JOBS records as the Timesheet Org.
Tab to <u>Budget ID</u> field.	Enter the most recent budget development year value, as “FYxxxx” (eg “FY2004”).
Tab to <u>Phase</u> field.	Enter a value of “LABOR”.
Tab to <u>Date Created</u> field.	Enter a date greater than or equal to the <u>Begin Date</u> field in the previous block. This represents the beginning date of the Salary Budget.
Tab to <u>Base Units</u> field.	Enter a value of “0” (zero).
Tab past: <u>Create FTE/Salary Records</u> <u>Position Budget Basis</u> <u>Position Annual Basis</u>	<i>These fields should be left at their default values.</i>
Tab to <u>Budget Appointment %</u> field.	Enter a value of “0” (zero).
Tab to <u>Budget FTE</u> field.	For status positions, enter the authorized position FTE value as a decimal (eg enter 100% as “1”; enter 80% as “.8”). For complimentary (non-status) and budget only positions, enter a value of “1” (one).
SAVE	Banner will display a confirming message of, “Transaction complete: 2 records applied.” <i>Note that the position’s Status has now automatically changed from Inactive to Active.</i>
Go to Options Menu	Select POSITION LABOR DISTRIBUTION



Banner: HR – Activate a New Position

What you do...	Comments / Prompts
Continued -	POSITION LABOR DISTRIBUTION
Tab to <u>Fund</u> field	Enter desired Fund code
Cursor automatically moves to <u>Orgn</u> field	Enter desired Organization code
Cursor automatically moves to <u>Acct</u> field	Enter desired Account code
Cursor automatically moves to <u>Prog</u> field	Leave program field as 020 - this is the only valid code
Tab to <u>Actv</u> field	Enter Activity code (note: this field is optional)
Leave <u>Locn</u> (location), <u>Project</u> and <u>Cost</u> blank	<i>These fields are not used.</i>
Note that <u>Salary Budget</u> is a “no visit” field.	The position’s salary amounts will be budgeted to specific lines via the NWAPBAD or NWACOMP forms.
Note that <u>Percent</u> is a “no visit” field.	The first FOAPAL you enter will report “100.00” in the Percent field. Subsequent lines will report “0.00”. Actual distribution percentages will be populated once salary amounts have been budgeted to specific lines.
Add additional budget lines if desired.	To enter a new FOAPAL line, press the “Arrow Down” key or function key F6. To use the previous FOAPAL line as a template, select “Duplicate” from the Record menu, or press function key F4. Update the desired fields on the duplicate line.
Delete budget lines if desired.	Highlight the line that you wish to delete. This line must have a Budget and a Budget to be Posted amount equal to zero. From the Record menu select Remove.
SAVE	The screen will return to the Position Salary Budgets block, and display the confirming message, “Transaction complete: x records applied.”
Press the Rollback button	The screen will return to the main Position Budget Information form.