

## **Entering/Revising Position Budgets**

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## SYSTEM POLICIES

The tasks in this documentation provide end users with the tools to enter data and collect data in system. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website.

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## **Entering/Revising Position Budgets**

### **Entering/Revising Position Budgets Overview**

For each position created, the following types of components can be used to plan for and manage agencies:

- Salary expenditures
- Hours worked
- FTEs
- Headcount (number of employees)

#### **When creating a position budget, the following steps are completed:**

- Identify what Home Business Unit the position will be assigned to.
- Identify the Security Business Unit assignment for the position.
- Identify whether one or more employees will be assigned to the position.
- Approve the need for the employees. The position's budget status must have an active status before you can assign it to an employee.
- Set up a budget for the employee salary and hours worked based on the employee's FTE.
  
- Assign the appropriate FTEs and head count to the position. Monitor hiring to ensure that you do not exceed the amount budgeted for the position.

#### **Entering G/L Account Information**

Actual payroll data for an employee is not reflected in position activity. Currently, AS - Budget Division does not enter G/L account information via EnterpriseOne. Run the Agency Budget Staffing report to review actual expenditures to budgeted salary information for employees.

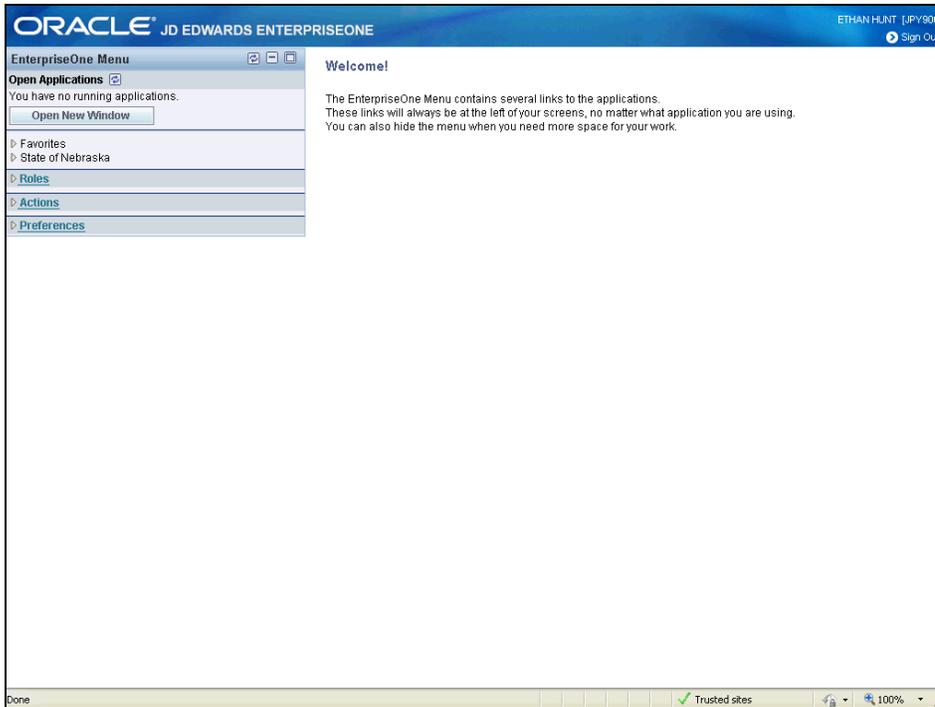
### **Create A Position Budget Lesson**

#### **Procedure**

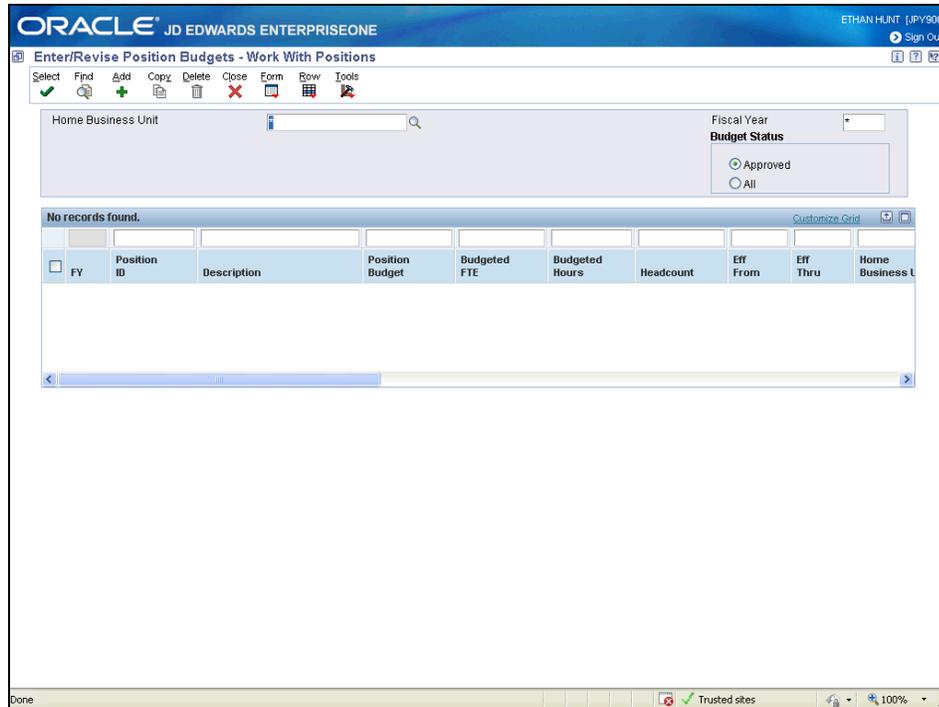
In this lesson you will learn how to create a position.

# Training Guide

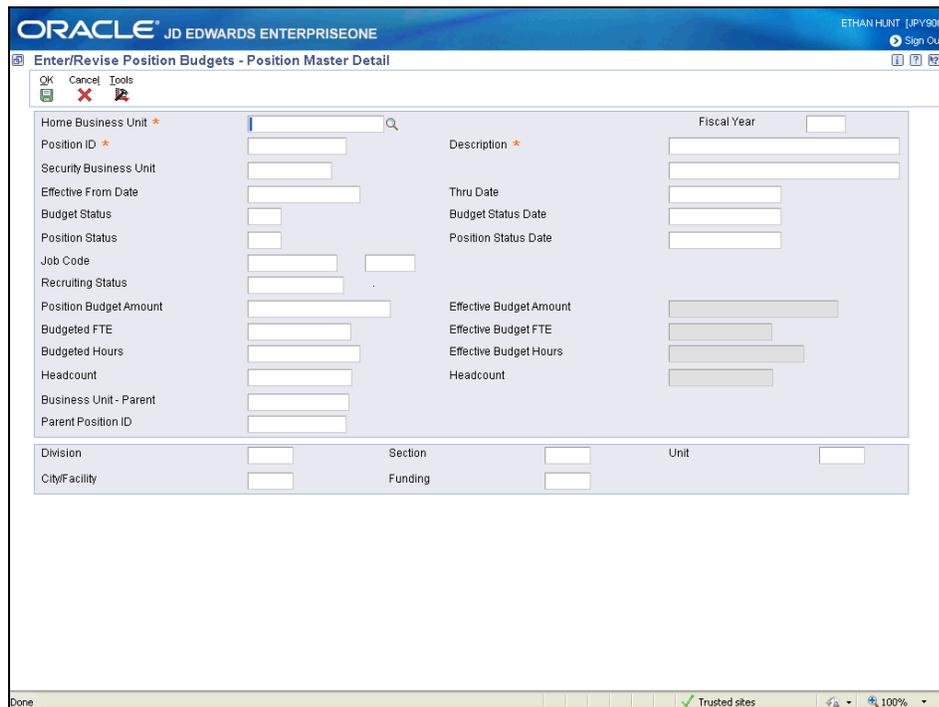
## Entering/Revising Position Budgets



Step	Action
1.	Click the <b>State of Nebraska</b> link. <a href="#">State of Nebraska</a>
2.	Click the <b>Human Resources</b> link. <a href="#">Human Resources</a>
3.	Click the <b>Position Control</b> link. <a href="#">Position Control</a>
4.	Click the <b>Enter/Revise Position Budgets</b> link. <a href="#">Enter/Revise Position Budgets</a>



Step	Action
5.	Click the <b>Add</b> button. 



# Training Guide

## Entering/Revising Position Budgets

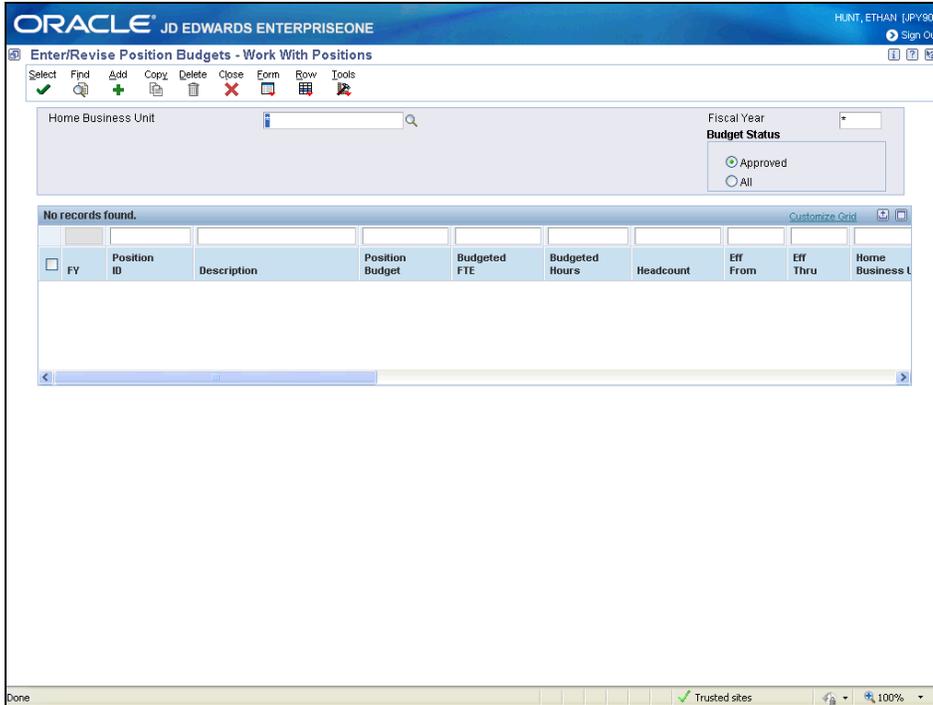


Step	Action
6.	Enter the Home Business Unit in the <b>Home Business Unit</b> field. The Home Business Unit entered must equal the home Business Unit of the Employee Master that the Position ID will be attached to.
7.	The <b>Fiscal Year</b> field will default to the current fiscal year. You can change it if necessary.
8.	Enter the Position ID in the <b>Position ID</b> field. The Position ID format should be a 3 digit agency number followed by 5 digits (i.e. 3 = 003xxxxx, 65 = 065xxxxx).
9.	Click in the <b>Security Business Unit</b> field. <input type="text"/>
10.	Enter the Security Business Unit number in the <b>Security Business Unit</b> field.
11.	<p>Enter the Budget Status in the <b>Budget Status</b> field. The status could be a "P", "F", "C" or "A" depending on the agency's internal process. The status must be "A" to attach an employee to the position.</p> <p><b>A</b> - Active  <b>P</b> - Planned / Waiting Funding  <b>F</b> - Temp Position  <b>C</b> - Closed</p> <p><b>WARNING - Be Sure To Read:</b></p> <p>If the <b>Budget Status</b> is equal to "A", the position will appear on the Vacancy Report (R581347A) provided to the Legislature.</p> <p>If the Position Status is "T" for Temporary Position the <b>Budget Status</b> should equal "F" for Temp Position.</p> <p>If the position is unfunded the <b>Budget Status</b> should equal "C" for Closed.</p>
12.	Enter the budget status date in the <b>Budget Status Date</b> field. This is normally when the position is created and there is funding available. The budget status date should change each time you change the budget status code.
13.	<b>Position Status</b> - When you attach an employee record to a vacant position, the system updates the position status code to "A". The system updates the position status code on the beginning date of the employee's assignment to the position. When the position again becomes vacant, you must manually change the value in the <b>Position Status</b> field to show the position is open.
14.	<p>If you must code the <b>Position Status</b> field manually to show a position open enter the position status code in the <b>Position Status</b> field. If necessary you can use the Visual Assist tool.</p> 
15.	Enter the date the position became open or filled in the <b>Position Status Date</b> field.
16.	<p>Enter the job code in the <b>Job Code</b> field.</p> <p><b>Note:</b> The <b>Description</b> field will automatically populate when you enter the job code in the <b>Job Code</b> field.</p>

Step	Action
17.	Enter the position budget amount in the <b>Position Budget Amount</b> field.
18.	The Budgeted FTE field must be less than or equal to 1. It will default to 1. You can override if necessary.
19.	<p>The number of hours that are budgeted for a position within a business unit for a period of one year will automatically fill in the <b>Budgeted Hours</b> field based on the number entered in the <b>Budgeted FTE</b> field. For example, 1.00 in the <b>Budgeted FTE</b> field equals 2080 in the <b>Budgeted Hours</b> field.</p> <p><b>Note:</b> If you change the <b>Budgeted FTE</b> field to a number less than 1 then you will need to delete the 2,080 number in the <b>Budgeted Hours</b> field. Then when you tab or click out of the field the system will automatically calculate the number of hours based on the number you entered in the <b>Budgeted FTE</b> field.</p>
20.	<b>Headcount</b> field: Each Position ID should have a one to one association to an employee. Duplicate position IDs should not be created. The <b>Headcount</b> field should reflect " <b>1</b> ".
21.	<p>If applicable enter the following fields as well:</p> <p><b>Division</b> – Program or facility  <b>Section</b> – Subprogram  <b>Unit</b>  <b>City/Facility</b>  <b>Funding</b> – Bill number passed by Legislature to fund the position</p> <p>When updating these fields, if there is not a code for what you need and a new code needs to be created contact AS.</p>
22.	<p>Click the <b>OK</b> button.</p> 
23.	<p>Click the <b>Cancel</b> button.</p> 

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## Entering/Revising Position Budgets

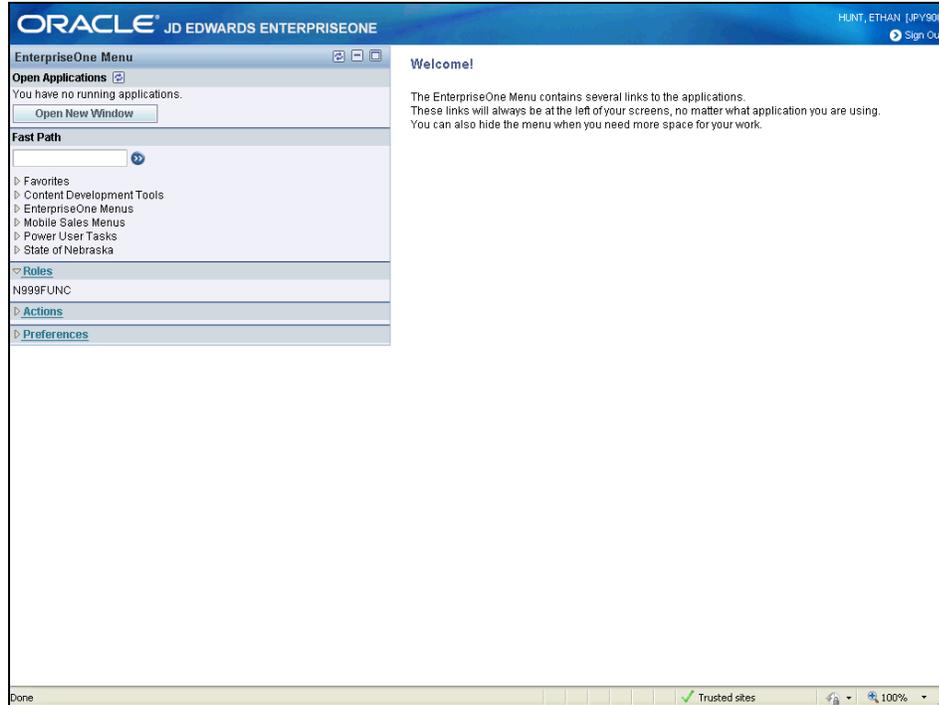


Step	Action
24.	Click the <b>Close</b> button. 
25.	<p><b>WARNING - Be Sure To Read:</b></p> <p>If a position has been reclassified, and the new description / classification varies dramatically from the old description / classification, or if a new Home Business Unit needs to be assigned to the position, please create a new Position ID and close the prior Position ID  <a href="http://www.das.state.ne.us/nis/training_manuals/hrp/L04_003_Closing_A_Position/Training%20Guide/Closing%20a%20Position_TRAIN.pdf">http://www.das.state.ne.us/nis/training_manuals/hrp/L04_003_Closing_A_Position/Training%20Guide/Closing%20a%20Position_TRAIN.pdf</a>.</p> <p><b>Note:</b> Tip - Instead of creating a new Position ID from scratch you can copy the existing position and then make the necessary changes. Again, be sure to close the prior Position ID if you create a new one from scratch or copy an existing one.</p> <p>You have successfully completed this lesson.  <b>End of Procedure.</b></p>

## Revise A Position Budget Lesson

### Procedure

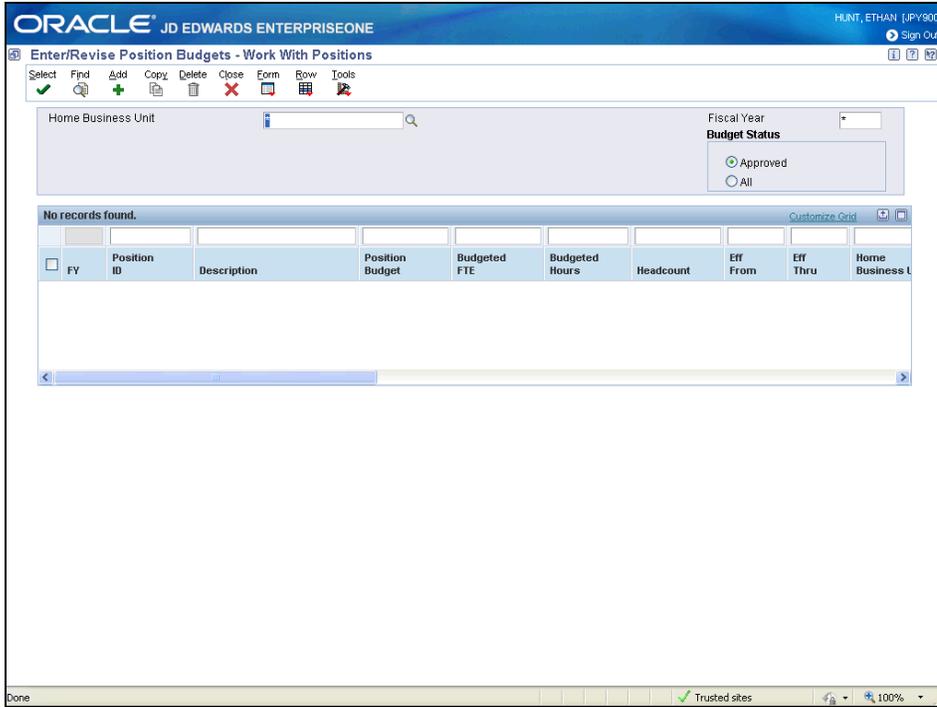
In this lesson you will learn how to maintain a position budget.



Step	Action
1.	Click the <b>State of Nebraska</b> link. <a href="#">State of Nebraska</a>
2.	Click the <b>Human Resources</b> link. <a href="#">Human Resources</a>
3.	Click the <b>Position Control</b> link. <a href="#">Position Control</a>
4.	Click the <b>Enter/Revise Position Budgets</b> link. <a href="#">Enter/Revise Position Budgets</a>

# Training Guide

## Entering/Revising Position Budgets



Step	Action
5.	You can narrow your search by entering any known information in the Header or QBE line. <input type="text"/>
6.	Click the <b>Find</b> button. 
7.	Choose the record you wish to maintain/edit by checking the check box to the left of the record. <input type="checkbox"/>
8.	Click the <b>Select</b> button. 
9.	On the Enter/Revise Position Budgets – Position Master Detail screen there are several fields you can complete/update if necessary. The fields which can be updated are listed below.
10.	<b>Security Business Unit</b>

Step	Action
11.	<p>Enter the Budget Status in the <b>Budget Status</b> field. The status could be a "<b>P</b>", "<b>F</b>", "<b>C</b>" or "<b>A</b>" depending on the agency's internal process. The status must be "<b>A</b>" to attach an employee to the position.</p> <p><b>A</b> - Active  <b>P</b> - Planned / Waiting Funding  <b>F</b> - Temp Position  <b>C</b> - Closed</p> <p><b>WARNING - Be Sure To Read:</b></p> <p>If the <b>Budget Status</b> is equal to "<b>A</b>", the position will appear on the Vacancy Report (R581347A) provided to the Legislature.</p> <p>If the Position Status is "<b>T</b>" for Temporary Position the <b>Budget Status</b> should equal "<b>F</b>" for Temp Position.</p> <p>If the position is unfunded the <b>Budget Status</b> should equal "<b>C</b>" for Closed.</p>
12.	<b>Budget Status Date</b>
13.	<p><b>Position Status</b> - When you attach an employee record to a vacant position, the system updates the position status code to "A". The system updates the position status code on the beginning date of the employee's assignment to the position. When the position again becomes vacant, you must manually change the value in the <b>Position Status</b> field to show the position is open.</p>
14.	<b>Position Status Date</b> - Date the position was last filled, last vacated or last frozen.
15.	<p><b>Job Code</b></p> <p><b>Note:</b> If your <b>Job Code</b> attached to this <b>Position ID</b> is changing, make sure you change the <b>Description</b> field to match the new Job Code.</p>
16.	<b>Budgeted Hours</b> – The number of hours that are budgeted for a position within a business unit for a period of one year.
17.	<b>Headcount</b>
18.	<p>If applicable update the following fields as well:</p> <p><b>Division</b> – Program or facility  <b>Section</b> – Subprogram  <b>Unit</b>  <b>City/Facility</b>  <b>Funding</b> – Bill number passed by Legislature to fund the position</p> <p>When updating these fields, if there is not a code for what you need and a new code needs to be created contact AS.</p>

# Training Guide

## Entering/Revising Position Budgets



ORACLE JD EDWARDS ENTERPRISEONE HUNT, ETHAN [JPY900] Sign Out

Enter/Revise Position Budgets - Position Master Detail

OK Cancel Tools

Home Business Unit \* 65025009 NIS Fiscal Year 09

Position ID \* 06512345 Description \* IT APPL DEVELOPER

Security Business Unit S850170000 DAS-NEBRASKA INFOR.SYSTEMS

Effective From Date Thru Date

Budget Status A Budget Status Date 06/18/2010

Position Status A Position Status Date 06/18/2010

Job Code A07011 IT APPL DEVELOPER

Recruiting Status

Position Budget Amount 35,000 Effective Budget Amount 35,000

Budgeted FTE 1.00 Effective Budget FTE 1.00

Budgeted Hours 2,080 Effective Budget Hours 2,080

Headcount 1 Headcount 1

Business Unit - Parent

Parent Position ID

Division Section Unit

City/Facility Funding

Done Trusted sites 100%

Step	Action
19.	After making your changes click the <b>OK</b> button. 

ORACLE JD EDWARDS ENTERPRISEONE HUNT, ETHAN [JPY900] Sign Out

Enter/Revise Position Budgets - Work With Positions

Select Find Add Copy Delete Close Form Row Tools

Home Business Unit Budget Status

Approved All

Records 1 - 1

FY	Position ID	Description	Position Budget	Budgeted FTE	Budgeted Hours	Headcount	Eff From	Eff Thru	Home Business Unit
09	06512345	IT APPL DEVELOPER	35,000	1.00	2,080	1			

Done Trusted sites 100%

Step	Action
20.	Click the <b>Close</b> button. 
21.	You have successfully completed this lesson. <b>End of Procedure.</b>