Update PBCS Position Funding

The purpose of this job aid is to explain how to update position funding in PBCS. This document provides instructions for the following:

- Change Funding Source
- Split Allocation between Funding Sources
- Delete Funding Source (used when no longer split funding a position)

Note: Changes are updated in real-time.

Change Funding Source for a Position

1. From the PBCS homepage, select the Departmental Budget icon.
2. Select the Position Budget Forms icon.
3. Click Existing Position by Department or Existing Position by Cost Center on the menu.
4. If necessary, click the Department area to locate your department.

a. Locate the required department name or Cost Center in the Member field.
b. Once the department is found, select the department name from the list and then click OK.

5. To locate the position you want to edit, scroll down the worksheet for or click in the Search icon and enter the Position ID.
6. Select the entire row with Position ID to view menu options
7. Right click or click Actions and select Transfer Position.
8. Locate the appropriate destination info accordingly (e.g. Cost Center, Department, etc.) by clicking the Member Selector icon.

9. Select the appropriate destination Cost Cent and/or Department. Click OK.

10. Once all changes are complete, click the Launch button.

Quotation marks do not have to be used, but if there is one at the front, there must be one at the back.
11. A confirmation window appears “Transfer Position ruleset was successful”, click OK.

Position still appears in old Cost Center with a position status of “None” Review in Existing Positions by Department or Existing Positions by Cost Center.

If combo code does not load automatically, the department and cost center are not tied together correctly. Adjust as necessary by using Transfer process again to correct source Department/Cost Center. Combo codes are extremely important.

Adjust Split Allocation between Funding Sources

Position split allocation exists

1. From the PBCS homepage, select the Departmental Budget icon.
2. Select the Position Budget Forms icon.
3. Click Existing Position by Department or Existing Position by Cost Center on the menu.
4. If necessary, click the Department area to locate your department.

   a. Locate the required department name or Cost Center in the Member field.
   b. Once the department is found, select the department name from the list and then click OK.
5. To locate the position you want to edit, scroll down the worksheet or click the Search icon and enter the employee name.

6. Right click on the Position ID cell to highlight the entire row.

7. Scroll right to the **Distrb %** column. All distribution percentages should be entered in decimal format. 100% = 1, 75% = .75 50% = .5, 25% = .25.

### Adjust Split Allocation between Funding Sources

8. Change the distribution percentages.

<table>
<thead>
<tr>
<th>Before Change</th>
<th>After Change, Not Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Distrb %</strong></td>
<td><strong>Distrb %</strong></td>
</tr>
<tr>
<td>42%</td>
<td>60%</td>
</tr>
<tr>
<td>58%</td>
<td>46%</td>
</tr>
</tbody>
</table>

9. Click the **Save** button.

10. A confirmation window appears “**The data has been saved**”, click OK.

11. If position is in the same department, the distribution can be updated at the same time. If the position is in different departments, it must be updated separately.

### Position split allocation needed

12. From the PBCS homepage, select the **Departmental Budget** icon.
13. Select the **Position Budget Forms** icon.
14. Click **Existing Position by Department** or **Existing Position by Cost Center** on the menu.
15. If necessary, click the Department area to locate your department.
Locate the required department name or Cost Center in the Member field.
Once the department is found, select the department name from the list and then click OK.

To locate the position you want to edit, scroll down the data form or click the Search icon and enter the Position ID.
Highlight the row with the Position ID.
Right click and select Copy Position.

The Action Menu – Copy Position Ruleset page is displayed.

*Quotation marks are not required, however, if there is one at the front, there must be one at the back.

Click in the Destination Cost Center field and enter the new department/cost center to split the position funding. Or, click the “Member Selector” icon to search for the new cost center. Locate the new cost center, select, and click OK.
Click the Launch button.
A message displays that the copy was successful, and the position now displays two different allocation lines. Adjust the distribution accordingly.
NOTE: If different departments within security, you can change the view to Single-Position Focus or manage one department at a time. Remember that there is no immediate audit to identify over 100% allocation.

22. Change the Distrb % column values as needed. All distribution percentages should be entered in decimal format. 100% = 1, 75% = .75 50% = .5, 25% = .25.

23. Click the button. A confirmation window appears “The data has been saved”, click OK.

Review in Existing Positions by Department or Existing Positions by Cost Center. If combo code does not load automatically, the department and cost center are not tied together correctly. Adjust as necessary. Combo codes are extremely important.

Delete Funding Source

This action would be used when a split funded position is no longer going to be split funded.

1. Identify which Cost Center is no longer going to be used. Go into Existing Positions by Cost Center.
2. Locate Position that will no longer be funded by the selected Cost Center
3. Select position, right click and select “Delete Position” from drop down. Box will pop up for verification
*Note this will not delete the position in its entirety. Only from the selected cost center. You will need to locate the other funding source(s) and adjust the distribution as necessary.

4. Once verified, click Launch. A confirmation window appears. Remember to go back, if not already done so, and adjust the distribution percentages. There is no audit to remind you a position is no longer fully budgeted. You can verify your changes by looking at Single Position Focus or going back in to Existing Positions by Department or Existing Positions by Cost Center. The line will remain but only as historical information. Status shows as “None” on the cost center that is no longer funding. No data will reflect in any of the categories except Position, Department/Cost Center and previous combo code.