

MODULE 3:

Positions & Budget Development

POSITION CONTROL

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1. Overview

USNH operates on a fiscal year that runs from July 1st through June 30th; throughout this fiscal year, position budgets are automatically calculated for the *following*, or **future**, fiscal year. Users can change these budgets in the **NZAWBUD** form by entering adjustment amounts in special **phases**. There are special rules for how grant positions and college work study positions are budgeted. Continuing Increase position budgets can be calculated via a WebI report, but must be manually entered in Banner. Day to day changes in the **BASE** value of a position do not leave a transaction record, but can be tracked using special reports in WebI. In order to ensure a smooth roll of the budget from the current to the future fiscal year, all discrepancies must be cleared prior to loading the budgets for the new year.

2. Roll Rules

You may recall from Module 2 that on the NBAPBUD form, each position has a Roll Rule defined; this controls how the position's budget will be calculated for the Future Year. The possible values for the Roll Rule consist of:

- Actual Expenditure
- **Current Budget**
- Current Encumbrance
- **Current Salary**
- **Range Midpoint**
- Remaining Budget
- **Zero**

Only the options shown in black boldface are actually used by USNH. The specific roll rule a position should use is defined by its position category; see the **Positions and Position Number Formats** cheat sheet for this information. The MR report, **HR32000 – Position Roll Rule Exceptions**, can help you catch any positions in your area with the wrong roll rule assigned.

Positions which have been cancelled and/or had an End Date coded, will not roll into the new fiscal year at all.

Special rules apply when a position is vacant. The system knows to look at a special table, **PZABROL**, to determine a secondary roll rule to use in this instance:

File Edit Options Block Item Record Query Tools Help

Budget roll types PZABROL 7.0 (BTST)

Fiscal Year

Budget roll types

Fisc Year	Ecls Code	Broll Type	Activity Date	User
2016	FD	Zero	30-JUN-2014	KATRINA
2016	FE	Zero	30-JUN-2014	KATRINA
2016	FF	Zero	30-JUN-2014	KATRINA
2016	FL	Zero	30-JUN-2014	KATRINA
2016	FM	Zero	30-JUN-2014	KATRINA
2016	FN	Zero	30-JUN-2014	KATRINA
2016	H0	Quartile	30-JUN-2014	KATRINA
2016	H1	Quartile	30-JUN-2014	KATRINA
2016	H2	Quartile	30-JUN-2014	KATRINA
2016	HE	Quartile	30-JUN-2014	KATRINA
2016	L0	Zero	30-JUN-2014	KATRINA
2016	L2	Zero	30-JUN-2014	KATRINA
2016	L4	Zero	30-JUN-2014	KATRINA
2016	LB	Zero	30-JUN-2014	KATRINA
2016	LD	Zero	30-JUN-2014	KATRINA
2016	P0	Quartile	30-JUN-2014	KATRINA
2016	P1	Quartile	30-JUN-2014	KATRINA
2016	T0	Zero	30-JUN-2014	KATRINA
2016	T1	Zero	30-JUN-2014	KATRINA
2016	T2	Zero	30-JUN-2014	KATRINA

Values are defined by fiscal year and ECLS code. You may notice that an additional roll rule option is available via this table, “Quartile” (this is because PZABROL is a custom USNH table, so we were able to define our own options).

As an example, you might have a PAT position with an ECLS of “P1”, which has a roll rule of “Current Salary” but happens to be vacant. Because it is vacant, Banner will look up the ECLS in the PZABROL table, see that it lists a Broll Type of “Quartile”, and roll the position’s budget at the first quartile of the Salary Range instead of the current budget value.

Why do we do this? When a position becomes vacant, often the budget may be greater than the first quartile; however, USNH hiring practice is to use the top of the first quartile as a salary cap for new hires, so there is no need to budget a vacant position at a higher value than that.

Roll Rules & FTE

Banner takes FTE into account when calculating future year position budgets. If a PAT position is vacant, PZABROL says it will roll at Quartile – but if the position is only 75% FTE, it will in fact roll at (Quartile x 75%).

What happens if a position FTE and its associated job FTE are not the same? Let's say you have a PAT position with an FTE of 100%, but for some reason the associated job only has an FTE of 80%. What Banner will do is apply the position roll rule for the 80% job, then apply the PZABROL roll rule for the 20% differential because it views that 20% as “vacant”. This is a one reason why keeping position and job FTE in synch is important.

3. NZAWBUD

Future Year position budgets are managed via the **NZAWBUD** form:

The screenshot shows the NZAWBUD 7.0 (BTST) form. The 'Search Information' block contains fields for Fiscal Year, Budget Id, Position, and Title. The 'Position Information' block contains fields for Status, ECLS, Roll Rule, and End Date. Below these are checkboxes for 'Delete All' and 'Undelete All'. The main data area is a table with columns: Index, Fund, Orgn, Acct, Actv, Nbrplot, Field Name, Phase 1, Phase 2, Phase 3, Phase 4, Phase 5, Phase 6, Phase 7, Phase 8, and Phas. The table has multiple rows for data entry.

In the “Search Information” block, the Fiscal Year field should be completed with the future year’s value, i.e., during fiscal year 2015, you would be budgeting for the future year 2016, so

4. Phases

Position budgets are built of multiple **Phases**:

- **LABOR** – the currently coded budget amount(s) from NBAPBUD; provided for reference.
- **BASE** – the closest annualized value that can be determined in an automated manner; calculated by Banner using the position’s roll rule and budget FOAPAL distribution.
- **ADJFY** – the Future Year Adjustment phase, where permanent, ongoing adjustments can be made (e.g. permanently increasing the FTE from 80% to 100%); allows for adjustments in cases where roll rules cannot populate the correct annualized value.
- **LABFY** – the Future Year Labor phase, equal to the sum of BASE and ADJFY; represents the future year salary base.
- **ADJCY** – the Current Year Adjustment phase, where one-time, temporary adjustments can be made (e.g. reducing the budgeted salary because the incumbent will be on sabbatical for the coming year); allows for adjustments in cases where there is an expectation that the annualized value differs from expected current year needs.
- **LABCY** – the Current Year Labor phase, equal to the sum of LABFY and ADJCY; represents what will actually be fed into Banner for the new fiscal year budget.

To summarize,

$$\begin{array}{rcl} \text{BASE} & & \text{LABFY} \\ +\text{ADJFY} & & +\text{ADJCY} \\ \hline \text{LABFY} & \text{and} & \text{LABCY} \end{array}$$

All these phases can be a bit confusing, so here are two tips to simplify matters:

1. You can only manually code entries to the **ADJFY** and **ADJCY** phases.
2. **ADJFY** is for continuing, permanent changes; **ADJCY** is for one-time, temporary changes.

5. Position Total (PTOT) Data

In addition to **Phase**, each column in the **PTOT** section contains the following seven fields:

- **Status**: With the exception of the LABOR phase, this field is always set equal to “W”, short for “Working” (the “A” in the LABOR column is short for “Approved”).
- **Fiscal Year**: With the exception of the LABOR phase, this field is always set equal to the fiscal year value from the “Search Information” block.

- **Budget Id:** Equal to the fiscal year, with the addition of an “FY” prefix.
- **COA:** Short for Chart of Accounts; always equal to “Y”.
- **Orgn:** The Position Org (used to drive security for the position in the NBAPBUD form).
- **Budget FTE:** The position’s FTE value, expressed as a decimal (i.e. .75 = 75%).
- **Budget:** The sum of all FOAPAL detail line amounts that appear in the column.

These fields are prepopulated for the columns which are automatically generated (LABOR, BASE, LABFY, and LABCY). If you want to adjust even one of these values for the position, you will need to manually enter *all seven fields* in the desired adjustment column(s) (ADJFY, ADJCY).

Note that the NZAWBUD form has room for nine phases; USNH is only using the first six. Columns without a prepopulated value in the Phase field are not to be used, and must be left blank.

Once you have entered the desired values in the adjustment column(s), hit Next Block to go to the **PLBD** section.

6. Position Labor Distribution (PLBD) Data

The FOAPAL distribution that appears on this form is driven by the labor distribution in the NBAPBUD form for the current fiscal year. This is true even if the roll rule is set to “Current Salary” rather than “Current Budget” or “Quartile”; Banner will use the current NBAPBUD line distribution percentages to distribute the BASE amount across FOAPALs.

To add a new line, simply type in the desired FOAPAL. (Don’t forget to specify the Program code of “020” – you will need to either tab over to it, or manually use the horizontal scroll bar to bring it into view.) You can add a new line at \$0.00, by putting a zero in the applicable adjustment column; this is not recommended unless you are adjusting a budget-only position, as zero dollar lines can cause fatal errors on EPAFs. Otherwise, simply enter the amount of the adjustment.

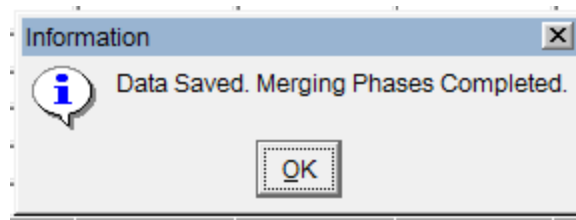
To decrease a line, enter a negative number in the adjustment column; to increase a line, enter a positive number.

To delete a line, it must first be set to zero, and it cannot be the sole line left on the position (every position must have at least one FOAPAL associated with it). Once the line is zero, checking the small box at the left edge of the form will flag it for deletion. If you have many lines and wish to flag most of them for deletion, you can save a little time by checking the

“Delete All” box – this will toggle the deletion boxes for all the lines, and then you can simply uncheck the line(s) you want to keep. (If you change your mind, “Undelete All” will toggle all the deletion boxes off again.)

You cannot directly change a FOAPAL element on an existing line. To change an existing line to a new FOAPAL, you will need to first reduce the existing line to zero, flag it for deletion, and then add a new FOAPAL line for the desired amount.

Once you have coded the changes you wish to make, hit Save. You will see a confirmation box:



Click the OK button. Your changes will be saved, and the appropriate phase columns will be updated.

7. NZAWBUD Message & Error Key

The NZAWBUD form can be a little quirky; there are a variety of automatic checks that Banner will perform during your entry, and the meanings of error messages produced may not be immediately obvious. To assist in your work, we’ve provided a table (alphabetical by the text of the message) of the possible error messages and what they mean:

Error or Alert Message	Explanation	Block
[FOAPAL element] Code entered is inactive; press LIST for valid codes	The value you entered in the specified field failed validation. Confirm that the entered value was typed correctly, in the correct field. Double-check that there are no “L/one” or “o/zero” substitution errors.	PLBD
[FOAPAL element] Code entered is terminated; press LIST for valid codes	The value you entered in the specified field failed validation. Confirm that the entered value was typed correctly, in the correct field. Double-check that there are no “L/one” or “o/zero” substitution errors.	PLBD

Error or Alert Message	Explanation	Block
[FOAPAL element] is not defined as Data Entry	The value you entered in the specified field failed validation. Confirm that the entered value was typed correctly, in the correct field. Double-check that there are no “L/one” or “o/zero” substitution errors.	PLBD
[FOAPAL element] is not valid	The value you entered in the specified field failed validation. Confirm that the entered value was typed correctly, in the correct field. Double-check that there are no “L/one” or “o/zero” substitution errors.	PLBD
[Position Number] 2005 FY2005 is busy. Read only.	A position can only be updated by one user at a time. If the position you attempt to access is already being accessed by another user, you will be able to view its data, but not make any changes.	Form Level
Account Index will not allow a [FOAPAL element] override	If an Index code is used to add a new distribution line, you will not be able to override the line’s values for individual FOAPAL elements. To change one or more of these fields, you will need to delete the line and add a new one without the Index code.	PLBD
Account will not allow a PROG override	Double-check that you have entered the correct PROG value.	PLBD
Data Saved. Merging Phases Completed.	Banner has finished saving and merging your records, without errors.	Form Level

Error or Alert Message	Explanation	Block
Data Saved. Merging Phases Completed. Not all deletes made.	Banner has finished saving and merging your records, but some line(s) you flagged for deletion could not be deleted. You should already have received one of the error messages above; this message is just to confirm that Banner has finished making all changes *other* than the problematic line deletion(s).	Form Level
Error in [phase name]: [field name] field should be defined	A required field has been left blank in the PTOT block for the referenced phase. Double-check that you have completed all required fields.	PTOT
Error in [phase name]: At least one labor distribution budget should be defined	The referenced phase does not have any FOAPAL lines associated with it. At least one line must be added in order for the phase to be successfully processed.	PTOT
Error in [phase name]: NBRPTOT_FTE has wrong value	Double-check that you have entered the correct FTE value in the PTOT block for the referenced phase. All FTE values must be entered as decimals, with 100% expressed as "1", 75% as ".75", etc.	PTOT
Error in [phase name]: ORGN does not exist or is not active	Double-check that you have entered the correct ORGN value in the PTOT block for the referenced phase.	PTOT

Error or Alert Message	Explanation	Block
Error in [phase name]: PTOT and PLBD budgets are not equal	<p>There is a discrepancy between the sum of the amounts on your PLBD distribution lines, and the total amount in the PTOT block.</p> <ul style="list-style-type: none"> You may have mistyped or transposed digits in the PTOT Budget amount field for the referenced phase; double-check that you have entered the correct amount. You may have overlooked a line you intended to add, or transposed digits in one of the amount fields; confirm that you have entered all needed FOAPALs, for the correct amounts. 	PTOT, PLBD
Fund/Orgn/Acct/Prog code must be entered	A new distribution line has been requested, without specifying the complete FOAPAL. The line cannot be added until the basic required elements (Fund, Org, Account, Program) have been specified.	PLBD
Invalid [FOAPAL element]	The value you entered in the specified field failed validation. Confirm that the entered value was typed correctly, in the correct field. Double-check that there are no “L/one” or “o/zero” substitution errors.	PLBD
Invalid fisc year	The fiscal year entered has not been defined in Banner. Double-check that you have entered the correct “Working” budget year.	Form Level
Invalid POSN. Press LIST for Valid Position	The position number entered is not recognized by Banner. Double-check that you have entered the correct position number. Double-click in the field to pull up a list of all valid position numbers.	Form Level

Error or Alert Message	Explanation	Block
<p>...Merge for [Phase Name]</p> <p>Non Z0 Negative, budget set to zero.</p>	<p>A negative amount was entered on one or more distribution lines, but the position's category is not "Z0". The negative amount will be rolled forward as a zero.</p> <p>This message will be repeated for each affected phase, with the phase name specified in the message box.</p>	PLBD
<p>...Merge for [Phase Name]</p> <p>Cannot delete non zero budget.</p>	<p>At least one distribution line flagged for deletion has a non-zero budget amount associated with it. The line's amount must be reset to zero before it can be deleted.</p> <p>This message will be repeated for each affected phase, with the phase name specified in the message box.</p>	PLBD
<p>...Merge for [Phase Name]</p> <p>Cannot delete last distribution line.</p>	<p>At least one distribution line must exist for the position in each phase. Confirm that you have not checked the "Delete" box for all lines.</p> <p>This message will be repeated for each affected phase, with the phase name specified in the message box.</p>	PLBD
Position must be entered	The Position Number field is blank. A value must be provided before the form can access any data.	Form Level
There is no budget for this position in [200x] fiscal year.	There are no records for this position for the year specified. Double-check that you have entered the correct position number. Does the position have an end-date? Is the position status "Canceled"? If this is a new position being established only in the "Working" budget year, was a Working budget record created for it in NBAPBUD?	Form Level

Error or Alert Message	Explanation	Block
Time is over	After thirty minutes of inactivity, NZAWBUD will release the position on your screen to other users for updating. You will have to rollback and refresh your screen before you will be able to update the position.	Form Level
User not authorized to work on this position code	The requested position does not fall within your security level. Double-check that you have entered the correct position number.	Form Level

8. Automated Processes

The BASE phase is refreshed (recalculated) on a nightly basis, Sunday through Friday, so that changes to positions and jobs made during the course of daily business, can be picked up and reflected in the future year data. This refresh is referred to as the **BROL** process.

Every time BASE is refreshed, it is merged forward through the other phases, picking up your entries in the ADJFY and ADJCY phases to produce updated LABFY and LABCY values. This is referred to as the **MERG** process.

The BROL and MERG processes run at approximately 7:00 p.m. **While they are running, it is critical that users not be in the position control tables; therefore, users are asked to stay out of these tables between 7:00 p.m. and 7:30 p.m. nightly:**

- NZAWBUD
- NBAPBUD
- NBAPOSN
- NWAPBAD

9. Management Reporting/WebI

USNH has a robust management reporting (MR) environment, using the WebI tool. For position control, the relevant reports live in two directories in WebI:

- **HR30000** – Position Budget
- **BUD2000** – Prep Quality Control Checks

The first directory consists of general position control reports; the second, as its name suggests, is a series of reports for identifying potential problems with the data coded in Banner HR. **Prior to our rolling the budgets forward for the new fiscal year, all discrepancies found by these reports need to be cleared.** Contact the USNH Budget office if you have any questions about these reports, or if you cannot locate a report that provides the data you need; we may be able to tweak an existing report for you, or if the suggestion is something that might be of benefit to others as well, we can pursue having a new report created.

The MR environment reflects day-old information, rather than live data; therefore, you need to wait for the nightly production cycle to run before you will see a transaction reflected on the reports. The update begins running at approximately 9:30 p.m. This production cycle occurs on Sunday-Thursday for most of the year, but during the heart of Budget Development (mid-April through mid-June), runs on Friday nights as well.

WebI can be accessed via the USNH Gateway page.

10. Researching Changes

The NZAWBUD form does not create transactions – when BASE is updated, it simply changes. This can make researching the changes difficult. Your budget for the future year changed overnight; how do you tell what caused the change?

Fortunately, tools have been provided in the form of two MR reports:

- **HR30420** – Position Budget Changes by Fund
- **BUD2900** – Position Budget Changes by MR Snap Date

The first report allows you to obtain a listing of the net change amounts by position, between two specified dates. The second provides a history of a given position's BASE value over time.

11. Future Year LABOR Phase

NZAWBUD allows you to manage your position budgets for the Prep year; in order to see your full budget, including supplies, equipment, etc., this data needs to be ported from the HR side of Banner to the Finance side. This is done by an automated nightly process, which grabs the LABCY phase information, calculates the associated fringe, and puts it all into a phase *in Finance* called LABOR. This allows for the creation of consolidated budget reports in MR, showing both the HR and non-HR components of the total budget.

It is important to note that this LABOR phase *in Finance* is different from the actual new year LABOR phase, which will be created *in HR* when the budgets for the new fiscal year are loaded in June. **The future year LABOR phase cannot be used in HR prior to this point.** The Finance LABOR phase is fully automated – there is no manual data entry – and is not reflected anywhere in Banner HR; it also reflects aggregate data by FOAPAL, rather than data by position.

12. LABOR Refresh Suspension

In the past, once campus users' access to Prep concluded, a complex dance was required to keep Funds in balance until budgets were loaded for the new fiscal year. Normal current year transactions would continue to flow through the HR system, resulting BASE values changing from one day to the next; when the Finance LABOR phase was refreshed overnight, Funds would go out of balance as a result of these HR transactions. USNH Budget would then have to contact the campuses on a daily basis to identify offsetting entries, and code those adjustments into the system on their behalf. This created a tremendous amount of “churn” and busy work.

Beginning in FY14, a more streamlined approach was implemented. When campus users' access ends, the LABOR refresh is turned off, and a snapshot (“**BEFORE**”) taken. Current year HR transactions then can continue to flow through the system, but do not put Funds out of balance because they are not imported to Finance (even though BASE continues to update).

Just before we are ready to load the new year budgets, the LABOR refresh is turned back on, and another snapshot (“**AFTER**”) taken. The BEFORE and AFTER snapshots are compared and the differential calculated on a FOAPAL-by-FOAPAL basis; this differential is then loaded into Budget Development and merged into the BUDDEV phase in Finance, against special account codes **61PREP** and **65PREP** (for salaries/wages and fringe benefits, respectively) in the PPB Orgs. This keeps the Funds in balance, without having to track down corrections on a onesie-twasie basis.

The overall goal is to produce a balanced all-funds budget for the future year, without users having to continually adjust for moving targets generated by HR data; this allows for a stable review period before budgets are approved and created in Banner.

13. Fringe Benefit Budgets

Each year, various fringe benefit rates are set:

- Full Fringe for Grant Funds
- Full Fringe for Non-Grant Funds
- Fringe for Post-Docs
- FICA-Only for Grant Funds
- FICA-Only for Non-Grant Funds

These rates are coded in special tables outside of Banner, and applied nightly, via automated process, to the values in the LABCY phase; the resulting amounts are stored in the LABOR phase in Finance. This can make it challenging to determine the fringe amount associated with a specific position, as the amounts in LABOR are aggregated by FOAPAL.

To find the fringe rate(s) being applied for a specific position, see the MR report:

- **BUD3040 – Position Fringe Rate Report**

To find the fringe rates that apply for a specific Fund, see:

- **BUD3041 – Fund Fringe Rate Report**

The rates are also available by contacting the USNH Budget Office.

14. 95ZPPB-YZMPPB & Grant-Funded Positions

Grant-funded positions pose a special challenge in budget development, because grant funds are budgeted directly in Banner Finance by SPA (Sponsored Research Administration) on an ongoing, multi-year basis, rather than being loaded each June for the coming USNH fiscal year. At the same time, we need to ensure that the positions are fully budgeted in Banner HR; however, if we roll position budgets with grant Funds on them into the new year, those grant Funds will wind up being double-budgeted in Banner Finance.

The solution is to use clearing Fund-Org **95ZPPB-YZMPPB** in place of any and all grant Fund-Orgs on position labor distributions in HR. This flags the lines as being funded by grants, and allows the positions to be fully budgeted without creating an overbudget situation for real grants in Finance.

To catch any situations where a grant fund may have been cited on a position in error, please see the MR report, “**BUD2051 – P1 Funds on Positions in LABCY**”.

At the end of Budget Development, just prior to loading the budgets for the new year, USNH Budget will total up all the 95ZPPB-YZMPPB usage in Prep, and enter offsetting amounts on a special budget-only position, **YZ95ZZ**. This will result in the 95ZPPB-YZMPPB usage netting to zero, and loading no budget to Finance.

Note: once the new year opens, campus users must redistribute the 95ZPPB lines in Payroll (via PHAREDS) to actual grant FOAPALs; payroll expenses cannot be processed against the clearing Fund.

15. College Work Study (CWS) Positions

CWS positions also have special rules. Each Spring, USNH HR collects updated CWS Fund information from each campus for the coming year, and shares this data with USNH Budget. CWS positions then need to be updated to cite these new Funds in NZAWBUD. However, because they are grant Funds, we also need to exactly offset these budget amounts, in order to prevent overbudgeting in Banner Finance. This offset is accomplished by using a budget-only position, whose position number ends in “**ZZ**”; the offsets are budgeted as negatives on the position.

USNH Budget updates the CWS Funds each year on the corresponding MR report:

- **BUD2808 – Balances – College Work Study**

Campuses should check this report carefully when budgeting their CWS positions, to ensure that they have fully offset the expense.

16. Current Year Adjustment (CYA) Positions

CYA positions, by their nature, are not permanent, ongoing positions; by definition, they should always have a LABFY value of zero. They should have a roll rule of zero, and be manually budgeted in the **ADJCY** phase; this will result in their budget being correctly reflected in the LABCY phase.

To check for CYA positions which may have been incorrectly budgeted, see the MR report:

- **BUD2021 – CYA Position Budget in Wrong Phase**

17. Calculating Increase Pools

Continuing Increase positions have a roll rule of zero: they must be manually budgeted in NZAWBUD for the new fiscal year. So, where do the numbers come from? Generally, each campus prepares an annual guideline for salary increases, which is approved by the Board of Trustees. The guideline increase percentages can then be fed into an MR report to calculate the Continuing Increase amounts needed:

- **HR33020 – Salary Grid**

This report allows you to select the specific flavor(s) of positions which are eligible for the increase(s), and apply percentages against them for several different types of increases. It will prompt you for:

- **Campus Code(s)**
- **Prep Fiscal Year**
- **Budget Phase** (generally “LABFY”)
- **Fund Type Lvl2 Code(s)** – *optional*
- **Fund(s)** – *optional*
- **RC Unit** – *optional*
- **Position Catg Code(s)** (generally “B”, “M”, and “T”)
- **Posn ECLS Code(s)**
- **Incumbent Effective Date** (generally the effective date of the increase)
- **Percentage Allocated for ATB Increases**
- **Percentage Allocated for Merit Increases**
- **Percentage Allocated for Other Increases**
- **Percentage Allocated for Other(2) Increases**

The resulting report offers a simple **Entry Grid** that breaks out the calculated increase amounts by Fund and Account, ready for coding against the appropriate position. The report also includes a **Summary Grid** by Campus, as well as detail information broken out by **ECLS/Acct/Catg** and **Fund/Acct/Posn**, and tab of raw data (“**Excel**”) ready for download to the desktop for further processing.