TeamBudget

www.multco.us/budget/teambudget

Positions

Training Handout

Version 1.0

Multnomah County

TeamBudget – Positions

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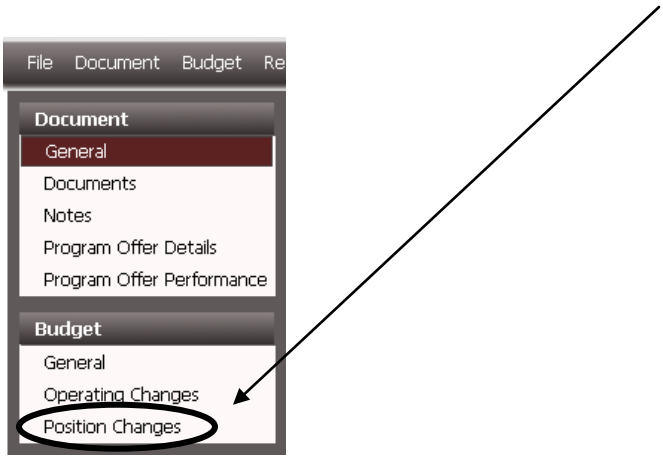
TeamBudget – Positions

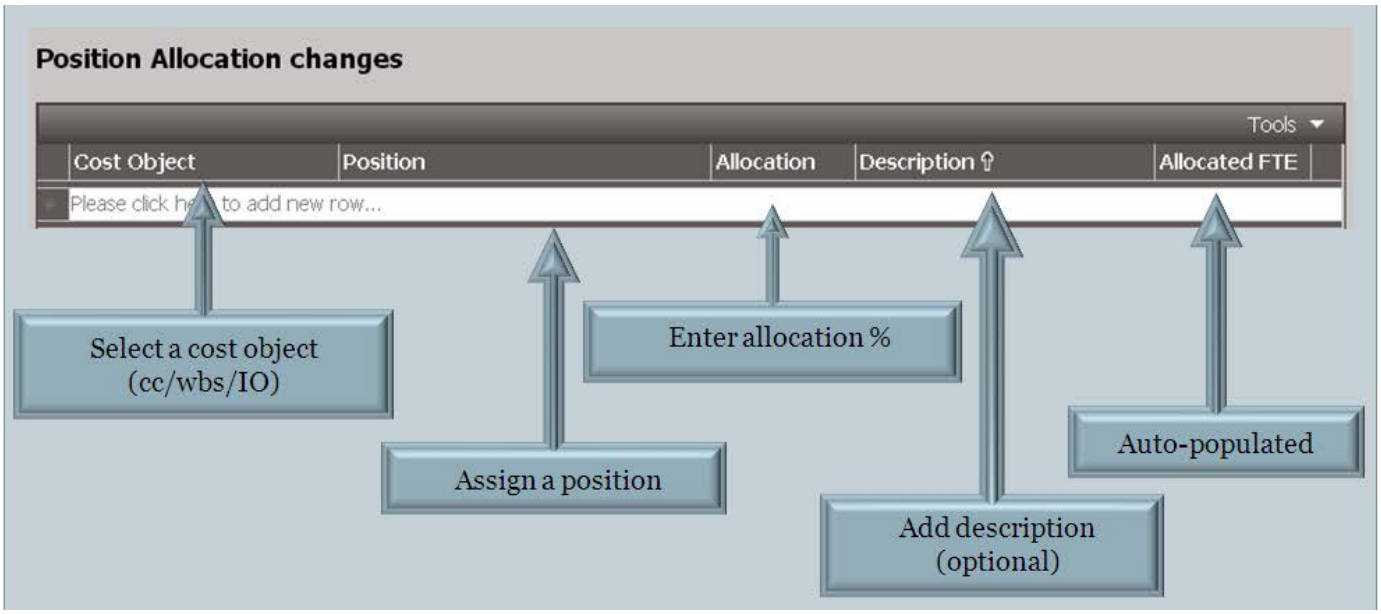
PROGRAM OFFER – POSITION CHANGES GRID

For a reminder of **how to open a program offer**, see TeamBudget Basics handout, p. 5

In a program offer, click on "Position Changes" in the left menu.



You will see this screen:

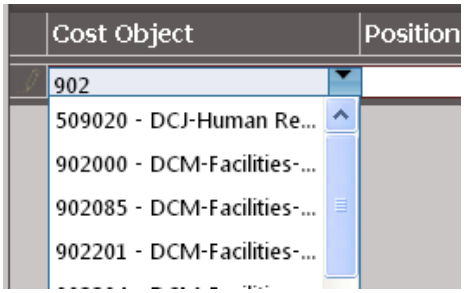


TeamBudget – Positions

MANUALLY ENTERING DATA

- **Entering Positions**

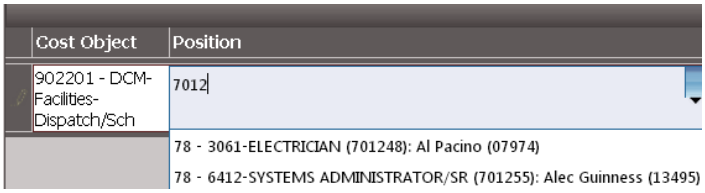
1. Place your cursor in the "Cost Object" column and start typing the number/name of the cost object (*i.e.* the cost center, WBS, or internal order). As you type, TeamBudget will pull up cost objects with the typed numbers/letters in them.



2. Select the desired cost object and click the Tab key to go to the next column ("Position")

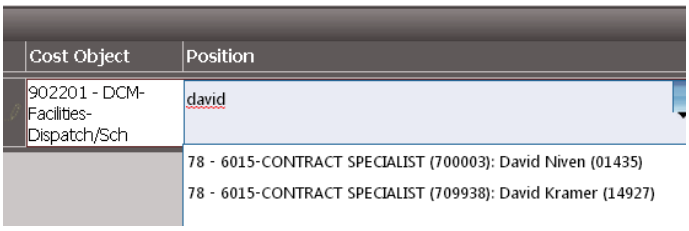
3. Start typing the position number, employee name, or other relevant information. As you type, TeamBudget will pull up positions with the typed numbers/letters in them. The dropdown list contains the position number, JCN number & name, and – if a filled position – employee name and SAP number. Example searches:

   a. Position number

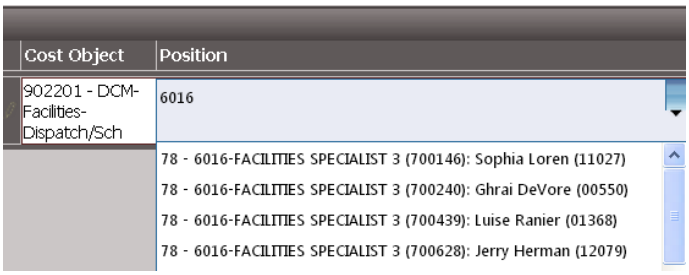


TeamBudget – Positions

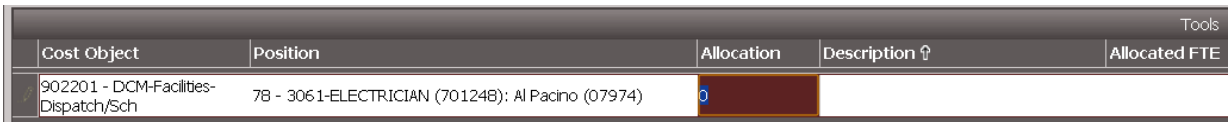
b. Name of employee tied to position



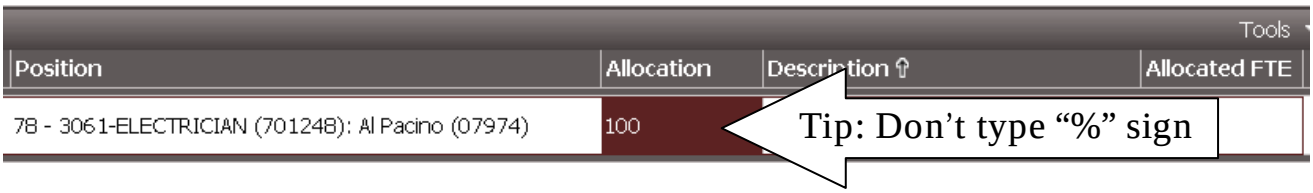
c. JCN number



4. Select the desired position and click the Tab key to go to the next column ("Allocation").



5. Enter the percent of the position tied to this cost object.



6. Click the Tab key to go to the next column ("Description" – optional).

TeamBudget – Positions

7. Click Shift + Enter to enter the row of data into the Position Changes Grid. (Note: when you reach the end of a row, you may instead click the Tab key to advance the row.)

Cost Object	Position	Allocation	Description	Allocated FTE
902201 - DCM-Facilities-Dispatch/Sch	78 - 3061-ELECTRICIAN (701248): Al Pacino (07974)	100		1

8. TeamBudget automatically calculates the allocated FTE.

Note: Each budgeted position must have a total allocation of 100%, even if it is split among cost objects or program offers.

Example: split a position evenly across two cost objects. Position 701534 is evenly split across cost centers 902000 and 902201.

Cost Object	Position	Allocation	Description	Allocated FTE
902000 - DCM-Facilities-Administration	78 - 3061-ELECTRICIAN (701534): Jessica Lange (13603)	50		.5
902201 - DCM-Facilities-Dispatch/Sch	78 - 3061-ELECTRICIAN (701534): Jessica Lange (13603)	50		.5

Example: split a position between two program offers. Below, position 703059 is split between two program offers (with different cost centers in each program offer).

Program Offer A:

Cost Object	Position	Allocation	Descr...	Allocated FTE
902500 - DCM-Facilities-Capital Imp Pgm	78 - 6016-FACILITIES SPECIALIST 3 (703059): Belen Pereyra (01304)	75		.75

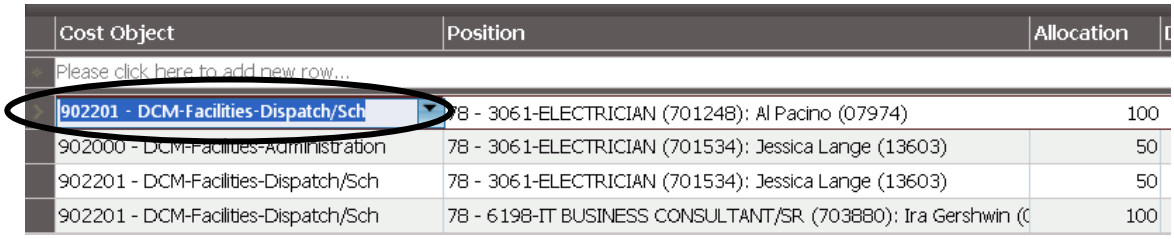
Program Offer B:

Cost Object	Position	Allocation	Descri...	Allocated FTE
709535 - NonD IT Helpdesk	78 - 6016-FACILITIES SPECIALIST 3 (703059): Belen Pereyra (01304)	25		.25

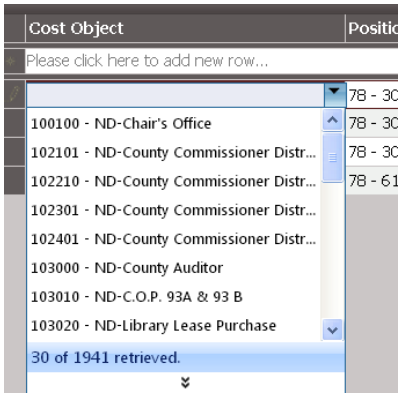
TeamBudget – Positions

Changing Data Already Entered in the Grid

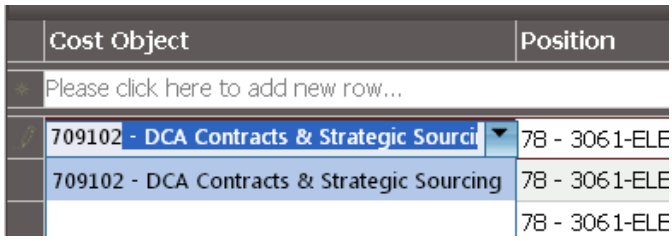
1. Double-click on the cell you want to change.



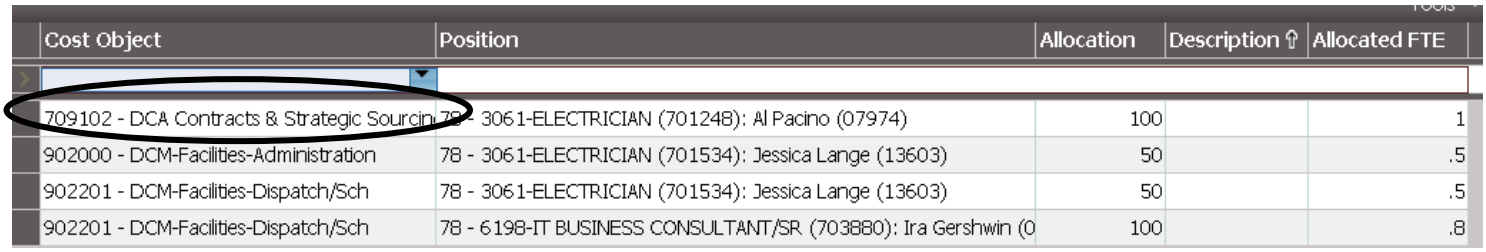
2. Delete the cell's contents (you must do this in order to refresh the dropdown menu).



3. Type the new data in the cell and wait for the dropdown to populate.



4. Click Shift + Enter; the change has now been saved in the grid.



TeamBudget – Positions

EXPORT/IMPORT AND UPLOAD HELPER TOOL

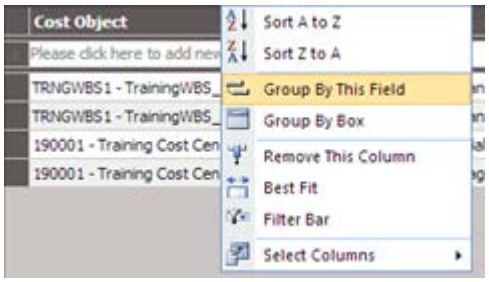
- Instead of manually entering positions in the Position Changes grid, you may have data in Excel that you wish to upload. TeamBudget's Import/Export feature allows you to do this.
- Due to the strict data formatting requirements of TeamBudget, data to be uploaded must be pasted into a spreadsheet generated from within TeamBudget.
- **Detailed handout: www.multco.us/budget/teambudget**
  - **Export spreadsheet** from TeamBudget
  - **Insert blank rows** in spreadsheet to make space for your data
  - **Paste data** into spreadsheet (always choose Paste Special/Values)
    - Note: you only need data in the columns with an asterisk
    - Delete any remaining blank rows
  - **Validate data** using the Upload Helper Tool
    - Contact the Budget Office if you do not have the add-in installed yet
  - **Save spreadsheet** with name and location you can find
  - **Import spreadsheet** into TeamBudget
    - Note: A new TeamBudget spreadsheet must be exported for each successful import and cannot be re-used. If, however, the spreadsheet fails to import, you can troubleshoot and then try again with the same document (i.e. you do not have to start from scratch if the data fails to upload).

TeamBudget – Positions

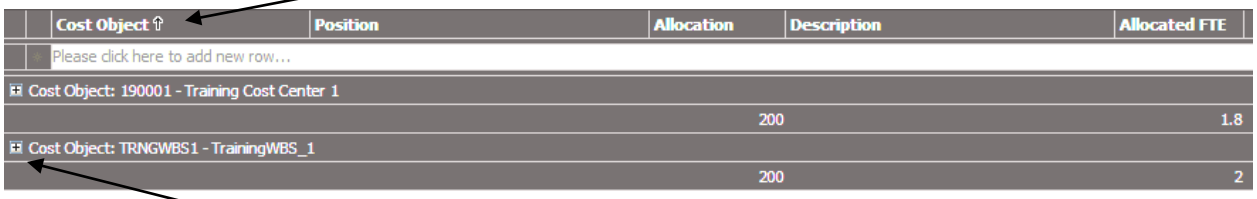
CHANGING APPEARANCE OF POSITION CHANGES GRID

Group by this Field

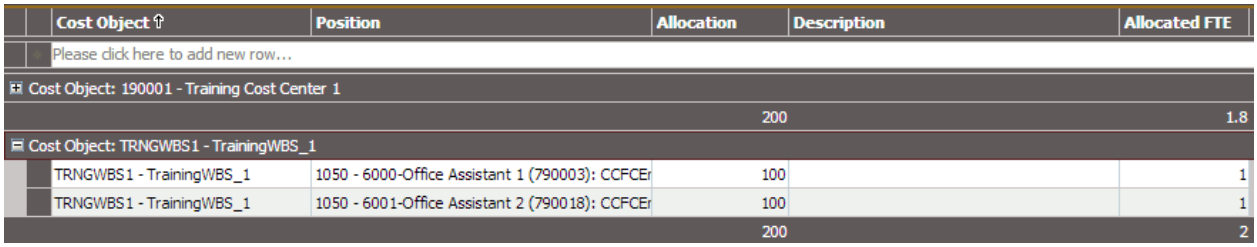
1. Right-click in the relevant column header and select "Group By This Field" (example below will group by Cost Object)



2. An arrow appears in the column header that is grouped, and relevant fields are grouped together



3. Click on the plus sign to see details

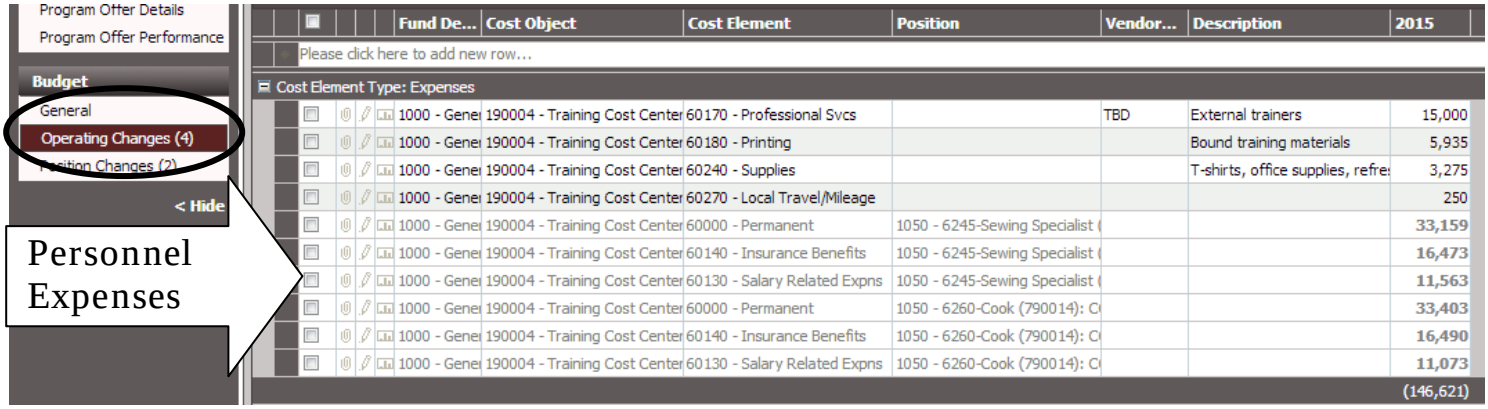


TeamBudget – Positions

VIEW EXPENDITURE/REVENUE DETAIL

- **View in Operating Changes Grid**

  After you've allocated a position to a program offer, TeamBudget calculates the personnel costs and adds them to the Operating Changes Grid. The rows are greyed out, which means that you can view – but not change – the data.

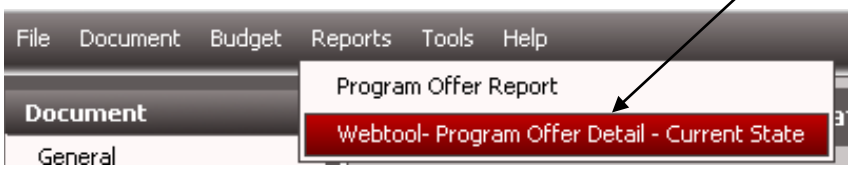


TeamBudget – Positions

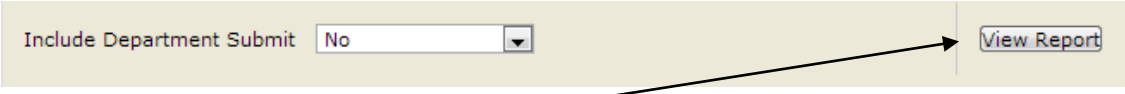
- **View in a Report**

1. Click on "Reports" in the top toolbar of the program offer.

2. Select "Webtool – Program Offer Detail – Current State" from the dropdown.



3. Select "Yes" or "No" for "Include Department Submit?" (select "No" while building the Department Requested budget).



4. Click "View Report."

multco.us
Multnomah County, Oregon

Webtool - Program Offer Detail - Current State

Budget Year: 2015

Department: 1050 - Commission on Children, Families, & Community

Program: 10505-15 - Sample Program Offer

Program Offer Stage: Department Sandbox

Include Department Submit: No

	Five Digit Fund:	1519	29991	29993		Total
	Cost Object:	190005	TRNGWBS3	9TRAINING.111	9TRAINING.222	
60000	Permanent	$0	$0	$35,676	$53,292	$88,968
60130	Salary Related Expns	$0	$0	$12,440	$17,666	$30,106
60140	Insurance Benefits	$0	$0	$9,573	$17,882	$27,456
60170	Professional Svcs	$60,000	$0	$0	$0	$60,000
60180	Printing	$5,000	$0	$0	$20,000	$25,000
60200	Communications	$3,000	$3,000	$3,000	$0	$9,000
60230	Postage	$1,000	$0	$0	$0	$1,000
60240	Supplies	$1,000	$50,000	$50,000	$0	$101,000
60260	Travel & Training	$3,645	$0	$0	$0	$3,645
	Total Expense	**$73,645**	**$53,000**	**$110,690**	**$108,840**	**$346,175**
50170	IG-OP-Direct Fed	$0	$53,000	$0	$0	$53,000
50180	IG-OP-Direct St	$73,645	$0	$0	$0	$73,645
50195	IG-OP-Fed Thru Other	$0	$0	$45,000	$108,840	$153,840
50200	IG-OP-Other	$0	$0	$65,690	$0	$65,690
	Total Revenue	**$73,645**	**$53,000**	**$110,690**	**$108,840**	**$346,175**
	Revenue Less Expense	**$0**	**$0**	**$0**	**$0**	**$0**

Note: you can also run this report from the Report Center.

TeamBudget – Positions

REPORTS

- **Exp/Rev Detail by Program Offer for Excel – Current State** (see p. 15 of TeamBudget Expenditures & Revenues handout) – *Note: rows with the base wage cost element (60000) will also show you the FTE associated with that line item.*
- **Position Allocations by Program Offer – Current State** (see p. 14 of TeamBudget Basics handout)
- **Webtool – Program Offer Detail – Current State** (see p. 10)
- **Webtool – Summary of Program Offers – Current State** (see p. 13 of TeamBudget Basics handout)

- **Position List**

  Shows every position that is in TeamBudget for the selected parameters, with information about whether – and where – the position is allocated in the department's budget.

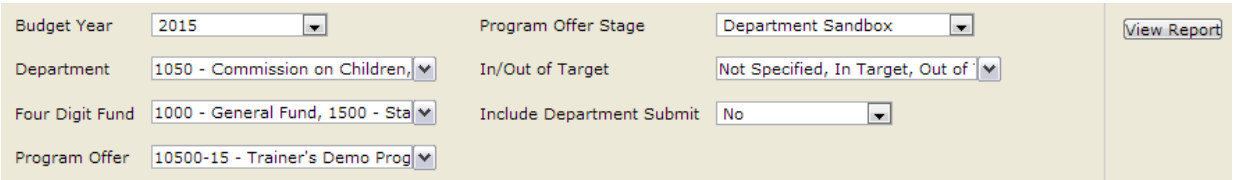
  1. From the Report Center, click "Run Report." This will open a new screen or tab with parameters to select and may run the report for a default set of parameters.
  2. Adjust the parameters if desired and click "View Report."

Position Status	Position Number	Start Date	End Date	Position FTE	JCN	JCN Description	Employee	Position Allocations	60000	60130	60140
Existing	790001	7/1/2014		1.00	6063	Project Manager	CCFCEmployee Name16 (29016)	Not Allocated	73,686	24,427	19,310
	790002	7/1/2014		1.00	6001	Office Assistant 2	CCFCEmployee Name8 (29008)	Not Allocated	33,237	11,018	16,479
	790003	7/1/2014		1.00	6000	Office Assistant 1	CCFCEmployee Name0 (29000)	Not Allocated	27,974	9,273	16,110
	790004	7/1/2014		1.00	6001	Office Assistant 2	CCFCEmployee Name7 (29007)	Not Allocated	39,676	13,153	16,929
	790005	7/1/2014		1.00	6000	Office Assistant 1	CCFCEmployee Name5 (29005)	Not Allocated	33,237	11,590	16,479
	790006	7/1/2014		0.50	9615	Program Manager 1	CCFCEmployee Name10 (29010)	Not Allocated	46,266	16,596	3,239
	790007	7/1/2014		0.80	9336	Finance Manager	CCFCEmployee Name9 (29009)	Not Allocated	76,032	25,965	19,474

TeamBudget – Positions

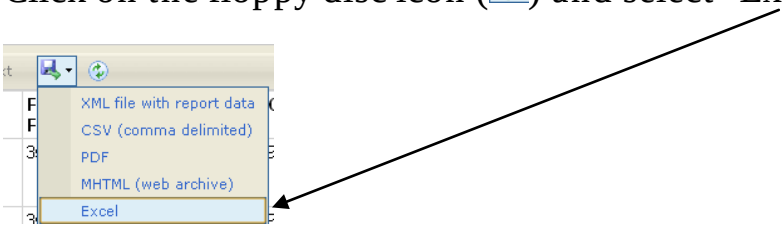
- **Position Allocations by Program Offer for Excel – Current State**
  Shows positions by cost object, cost element, and fund for each program offer.

1. From the Report Center, click "Run Report." This will open a new screen or tab with parameters to select and may run the report for a default set of parameters.

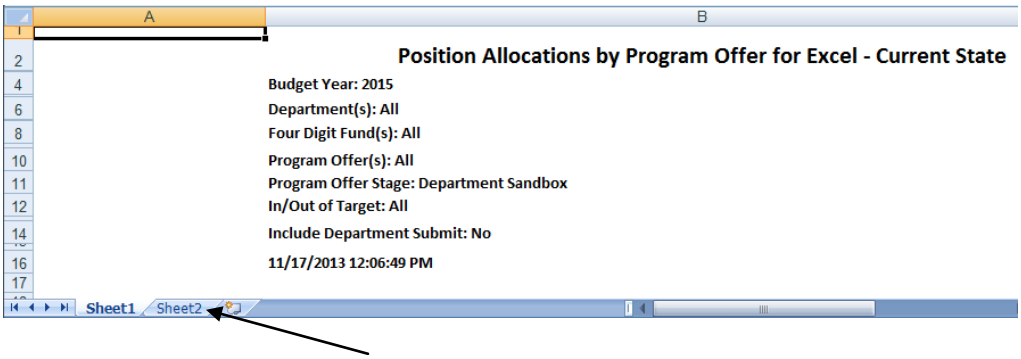


2. Adjust the parameters if desired and click "View Report."

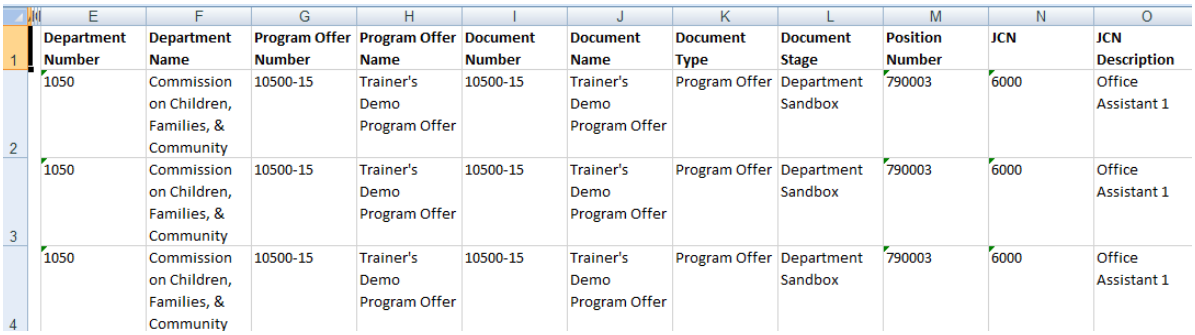
3. Click on the floppy disc icon ( ) and select "Excel" to export the data



4. In the exported Excel file, the first sheet provides summary information about the report.



5. Click on the second sheet to see the data.



	E	F	G	H	I	J	K	L	M	N	O
1	Department Number	Department Name	Program Offer Number	Program Offer Name	Document Number	Document Name	Document Type	Document Stage	Position Number	JCN	JCN Description
2	1050	Commission on Children, Families, & Community	10500-15	Trainer's Demo Program Offer	10500-15	Trainer's Demo Program Offer	Program Offer	Department Sandbox	790003	6000	Office Assistant 1
3	1050	Commission on Children, Families, & Community	10500-15	Trainer's Demo Program Offer	10500-15	Trainer's Demo Program Offer	Program Offer	Department Sandbox	790003	6000	Office Assistant 1
4	1050	Commission on Children, Families, & Community	10500-15	Trainer's Demo Program Offer	10500-15	Trainer's Demo Program Offer	Program Offer	Department Sandbox	790003	6000	Office Assistant 1

TeamBudget – Positions

Note: FTE information will only display in the row associated with the base wage cost element (60000); this helps users avoid having to filter summary results to get correct FTE amounts.

	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
1	Position Number	JCN	JCN Description	Position FTE	Employee	Four Digit Fund	Four Digit Fund Name	Five Digit Fund	Five Digit Fund Name	Cost Object	Cost Object Name	Cost Element	Cost Element Name	Total	Allocated FTE
2	790003	6000	Office Assistant 1	1.00	CCFCEmployee Name0 (29000)	1505	Fed/State Fund	29991	Training Example 1	TRNGWBS1	TrainingWBS_1	60000	Permanent	$27,974	1.00
3	790003	6000	Office Assistant 1		CCFCEmployee Name0 (29000)	1505	Fed/State Fund	29991	Training Example 1	TRNGWBS1	TrainingWBS_1	60130	Salary Related Expns	$9,273	
4	790003	6000	Office Assistant 1		CCFCEmployee Name0 (29000)	1505	Fed/State Fund	29991	Training Example 1	TRNGWBS1	TrainingWBS_1	60140	Insurance Benefits	$16,110	

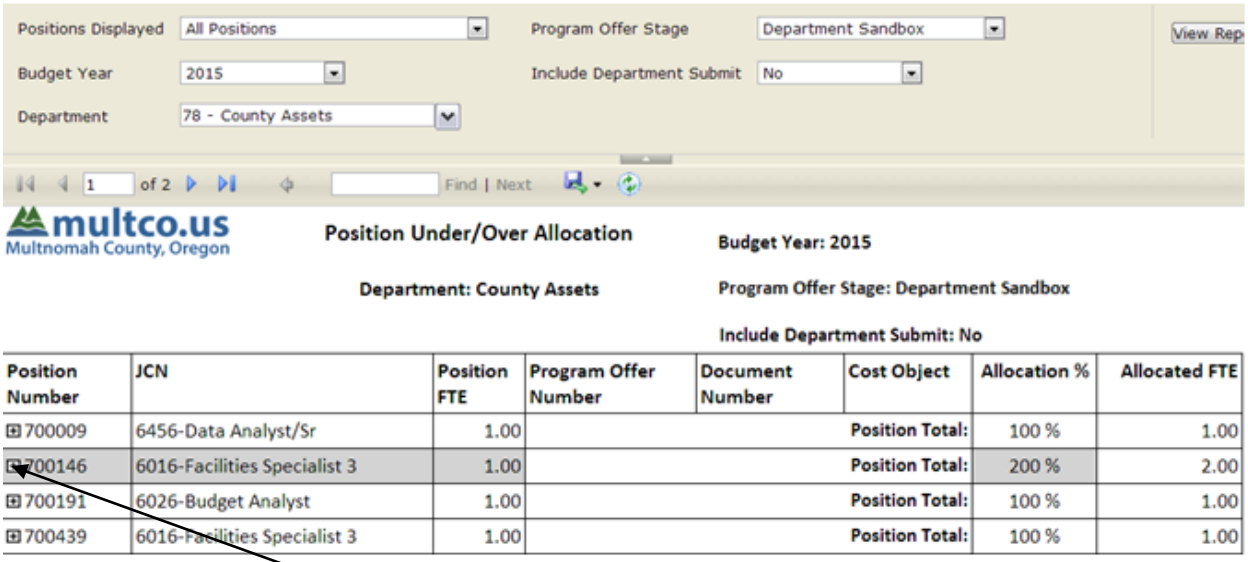
Sheet1 Sheet2

TeamBudget – Positions

- **Position Under/Over Allocation**
  Shows all positions allocated to program offers, and highlights positions with allocation over or under 100%.

1. From the Report Center, click "Run Report." This will open a new screen or tab with parameters to select and may run the report for a default set of parameters.

2. Adjust the parameters if desired and click "View Report."



Position Number	JCN	Position FTE	Program Offer Number	Document Number	Cost Object	Allocation %	Allocated FTE
⊞700009	6456-Data Analyst/Sr	1.00			Position Total:	100 %	1.00
⊟700146	6016-Facilities Specialist 3	1.00			Position Total:	200 %	2.00
⊞700191	6026-Budget Analyst	1.00			Position Total:	100 %	1.00
⊞700439	6016-Facilities Specialist 3	1.00			Position Total:	100 %	1.00

3. Click on the plus sign in rows highlighted in grey to see details regarding under- or over-allocation of positions. In the example below, the expanded details indicate that position 700146 was allocated 100% in program offer 78006A *and* 100% in program offer 78018.

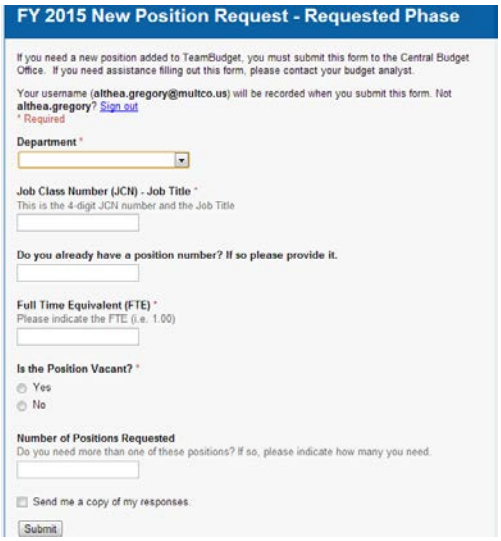
⊟700146	6016-Facilities Specialist 3	1.00	78006A-15	78006A-15	902900	100 %	1.00
			78018-15	78018-15	709101	100 %	1.00
					Position Total:	200 %	2.00

Note: you can also run this report with the parameter "Under/Over Allocated Positions Only."

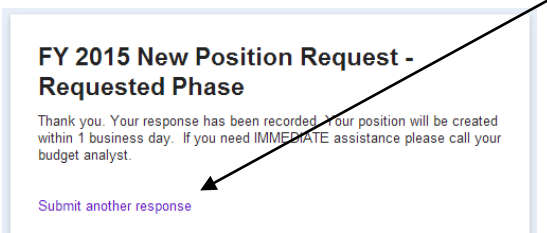
TeamBudget – Positions

REQUEST A NEW POSITION

1. Locate the form at **www.multco.us/budget/teambudget** and follow the instructions.

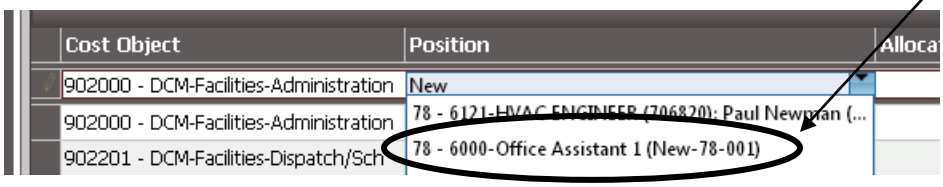


2. After you submit a request, you will see a thank you screen. If you immediately wish to submit another request, do not use the back button on your browser. Instead, click the link for "Submit another response."



3. The Budget Office will notify you when the new position has been created and will provide the position number (*e.g.* "New-78-001").

4. Follow the steps on p. 3-5 to enter the position. Look in the dropdown for the position number provided by the Budget Office.



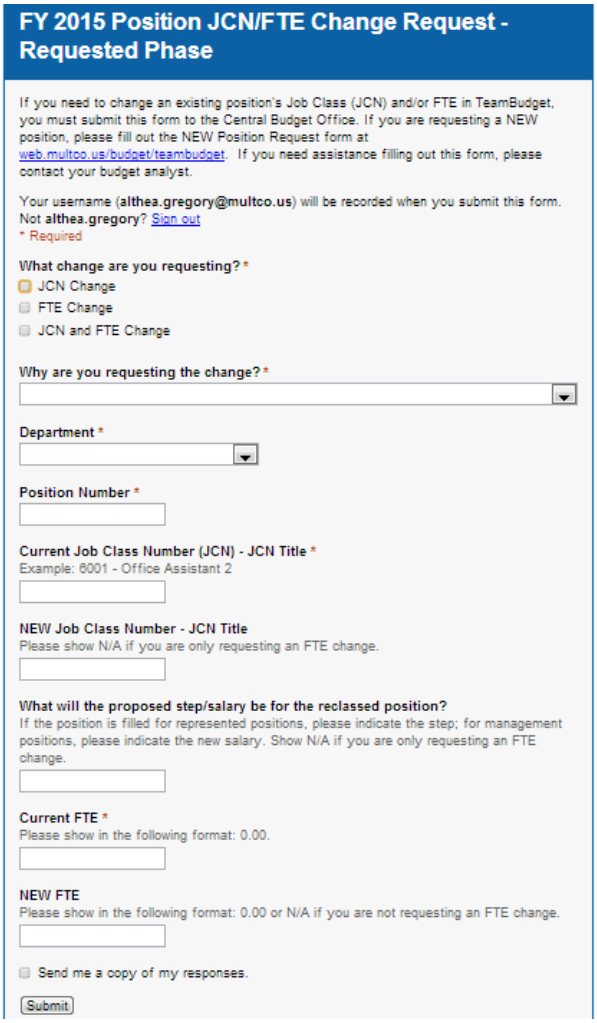
If this is an urgent request, fill out the form and then *call* your Budget Analyst to request expedited service.

TeamBudget – Positions

REQUEST A POSITION CHANGE

Reclassify a Position, Change FTE, or Change FTE & JCN in the Department Requested phase

1. Locate the form at **www.multco.us/budget/teambudget** and follow the instructions.



FY 2015 Position JCN/FTE Change Request - Requested Phase

If you need to change an existing position's Job Class (JCN) and/or FTE in TeamBudget, you must submit this form to the Central Budget Office. If you are requesting a NEW position, please fill out the NEW Position Request form at web.multco.us/budget/teambudget. If you need assistance filling out this form, please contact your budget analyst.

Your username (**althea.gregory@multco.us**) will be recorded when you submit this form. Not **althea.gregory**? Sign out

* Required

What change are you requesting? *
- JCN Change
- FTE Change
- JCN and FTE Change

Why are you requesting the change? *

Department *

Position Number *

Current Job Class Number (JCN) - JCN Title *
Example: 6001 - Office Assistant 2

NEW Job Class Number - JCN Title
Please show N/A if you are only requesting an FTE change.

What will the proposed step/salary be for the reclassed position?
If the position is filled for represented positions, please indicate the step; for management positions, please indicate the new salary. Show N/A if you are only requesting an FTE change.

Current FTE *
Please show in the following format: 0.00.

NEW FTE
Please show in the following format: 0.00 or N/A if you are not requesting an FTE change.

Send me a copy of my responses.

Submit

2. After you submit a request, you will see a thank you screen. If you immediately wish to submit another request, do not use the back button on your browser. Instead, click the link for "Submit another response."

FY 2015 Position JCN/FTE Change Request - Requested Phase

Thank you. Your response has been recorded. Your position will be updated within 1 business day. If you need IMMEDIATE assistance please call your budget analyst.

Submit another response

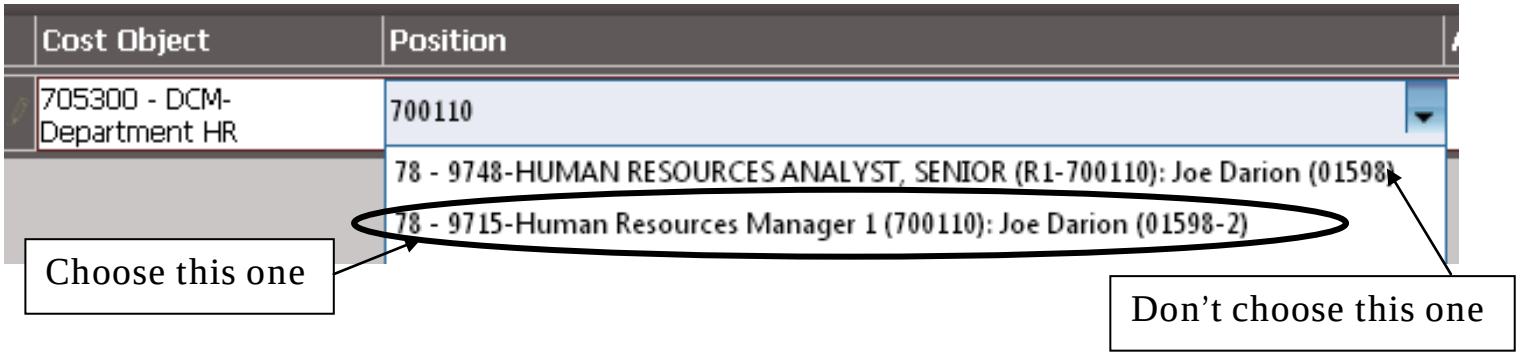
TeamBudget – Positions

3. The Budget Office will notify you when the changes have been made.

4. Follow the steps on p. 3-5 to enter the position. When selecting the position from the dropdown menu, you will see a position with the original position number and the updated information. Select this position.

   Note: You will also see a position with the old information and "R#-" in front of the position number. Don't choose this one.

   In the example below, the department requested that position 700110 be reclassified from a Human Resources Analyst, Senior to a Human Resources Manager 1.



If this is an urgent request, fill out the form and then *call* your Budget Analyst to request expedited service.

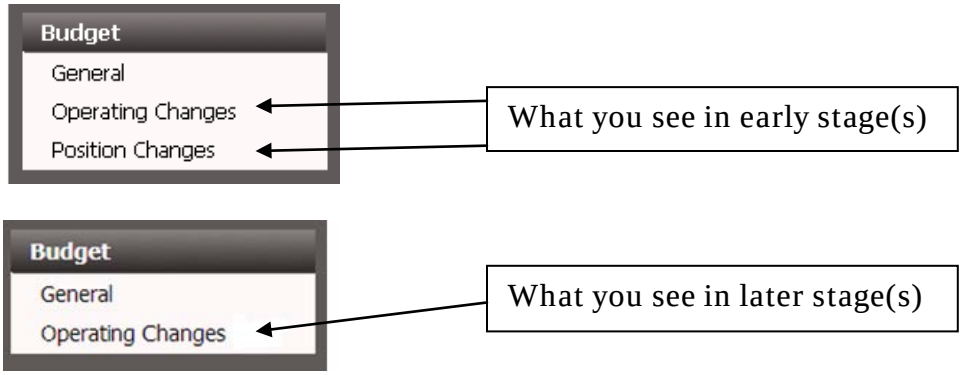
ELIMINATE A POSITION

In the Department Requested phase, if there is a position in TeamBudget that you do not want to include in your budget, simply **do not allocate the position** to a program offer.

TeamBudget – Positions

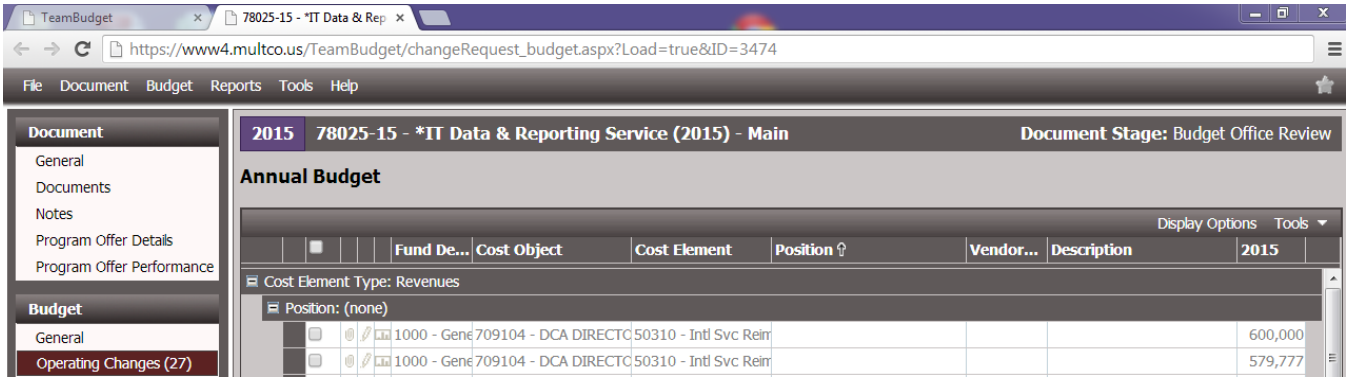
VIEWING POSITION CHANGES GRID IN LATER STAGES

Depending on a user's individual permissions within TeamBudget, there may come a point after a program offer has been promoted when a glitch in TeamBudget results in the "Position Changes" option disappearing from the program offer's Left Menu.

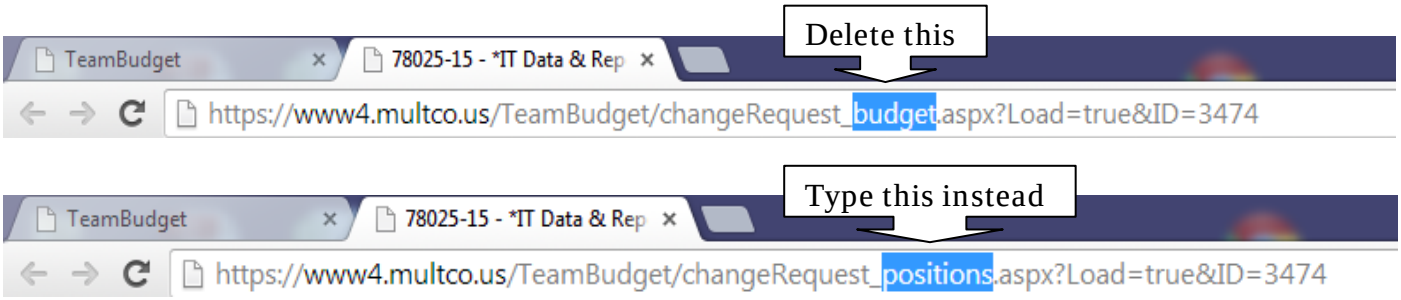


This is a known bug that will be fixed with the next application upgrade. For now, here is a simple workaround to view the Position Changes grid:

1. **Click on Operating Changes in the left toolbar.** You are now at the Operating Changes grid.

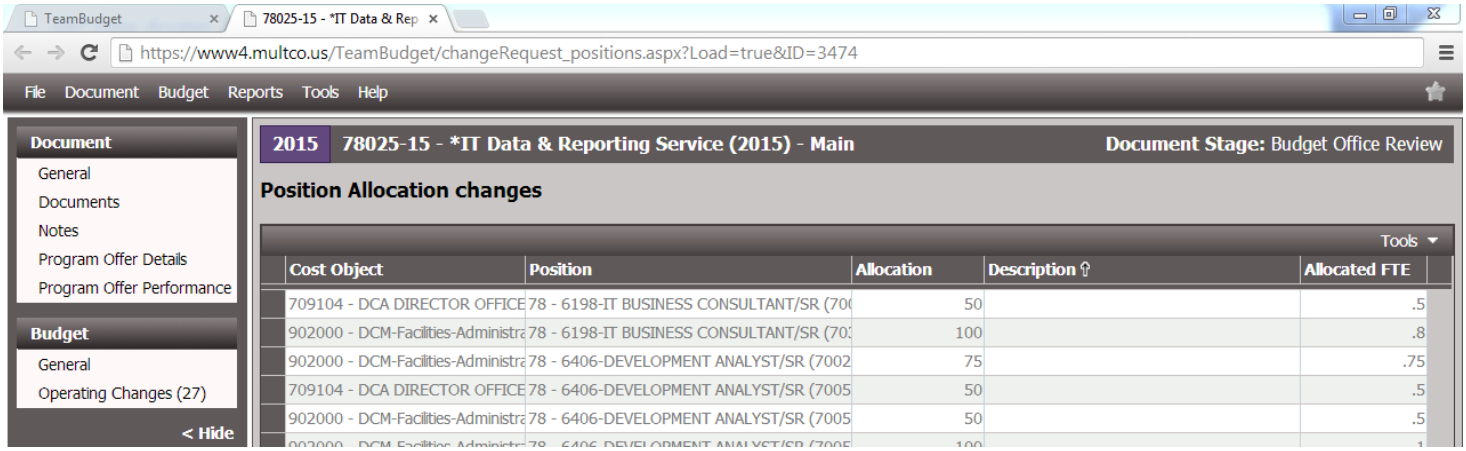


2. **Go to the url at the top of the page and replace "budget" with "positions"**



TeamBudget – Positions

3. Click the Enter key. TeamBudget will take you to the Position Changes grid.

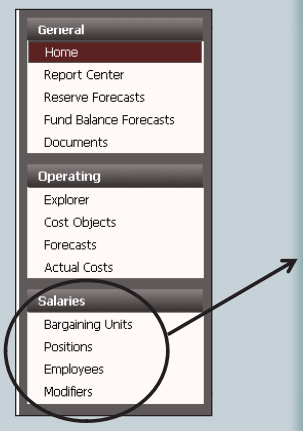


TeamBudget
Position Information

POSITION TRAINING HANDOUT
APPENDIX A

Position Costing Drivers

2



Salaries Module

Bargaining Units
- JCN steps/salary ranges

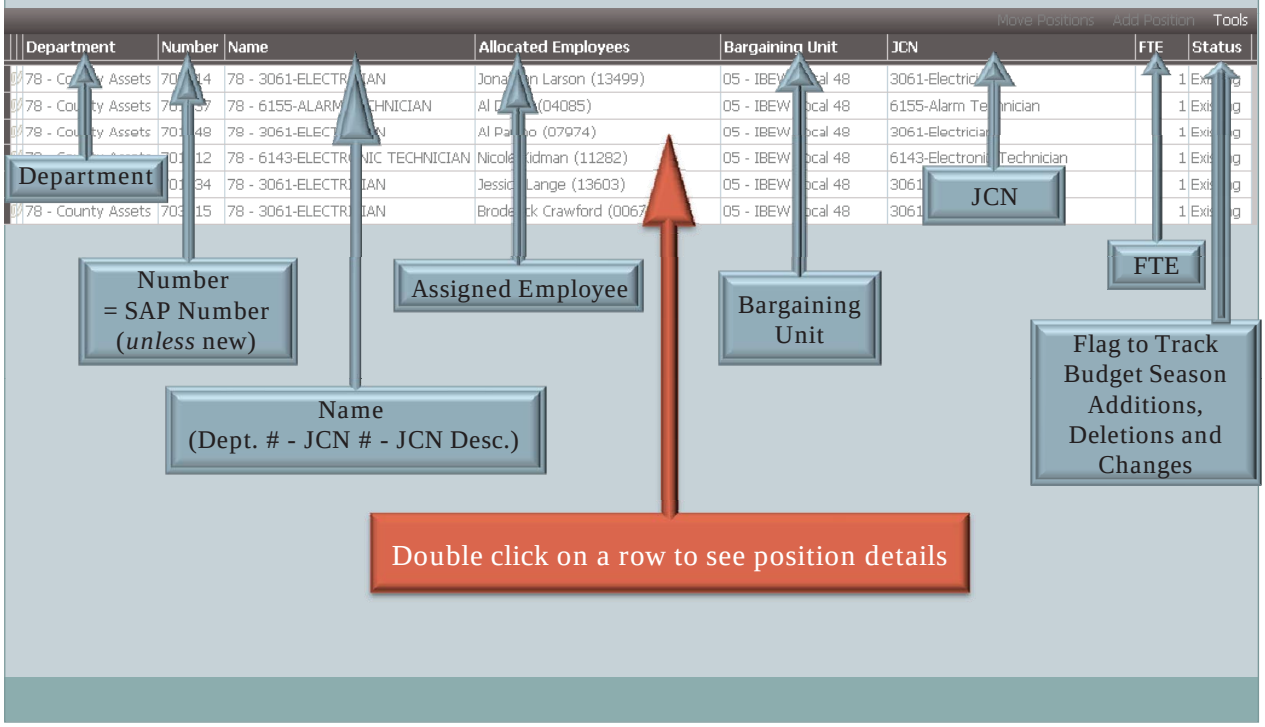
Positions
- FTE
- Dept
- JCN

Employees
- Wage scale/salary range placement
- PERS Group

Modifiers (Benefit Formulas)
- PERS
- Medical Insurance
- Non Med. Insurance
- VEBA

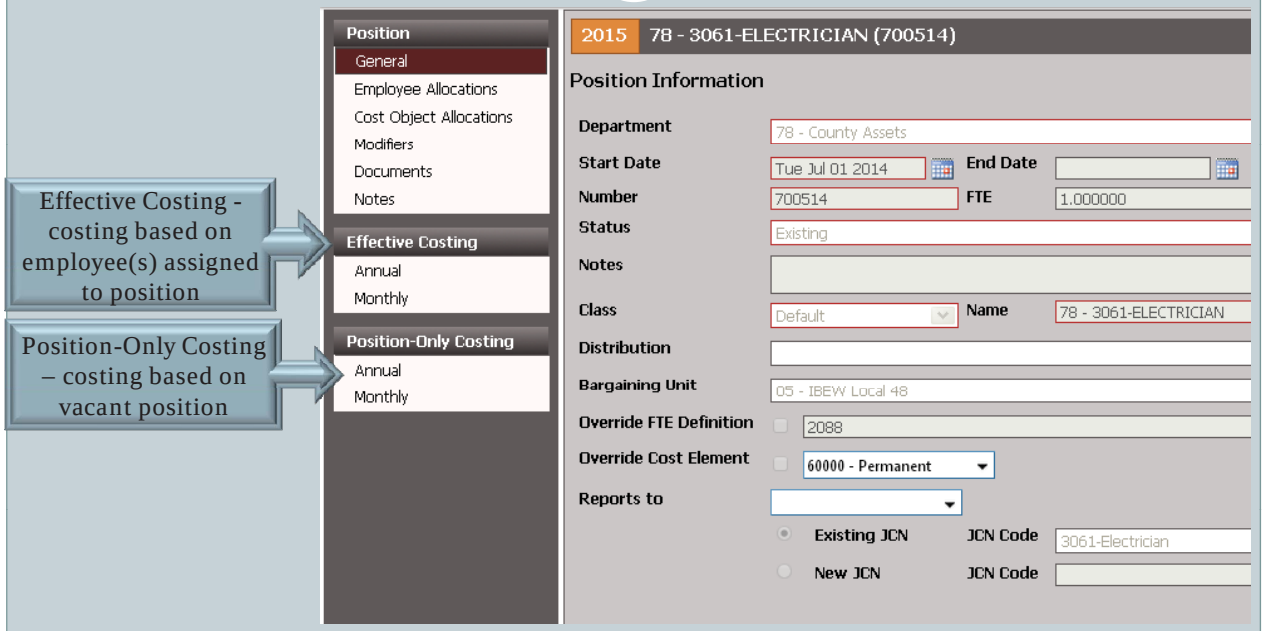
Position Records Grid

3



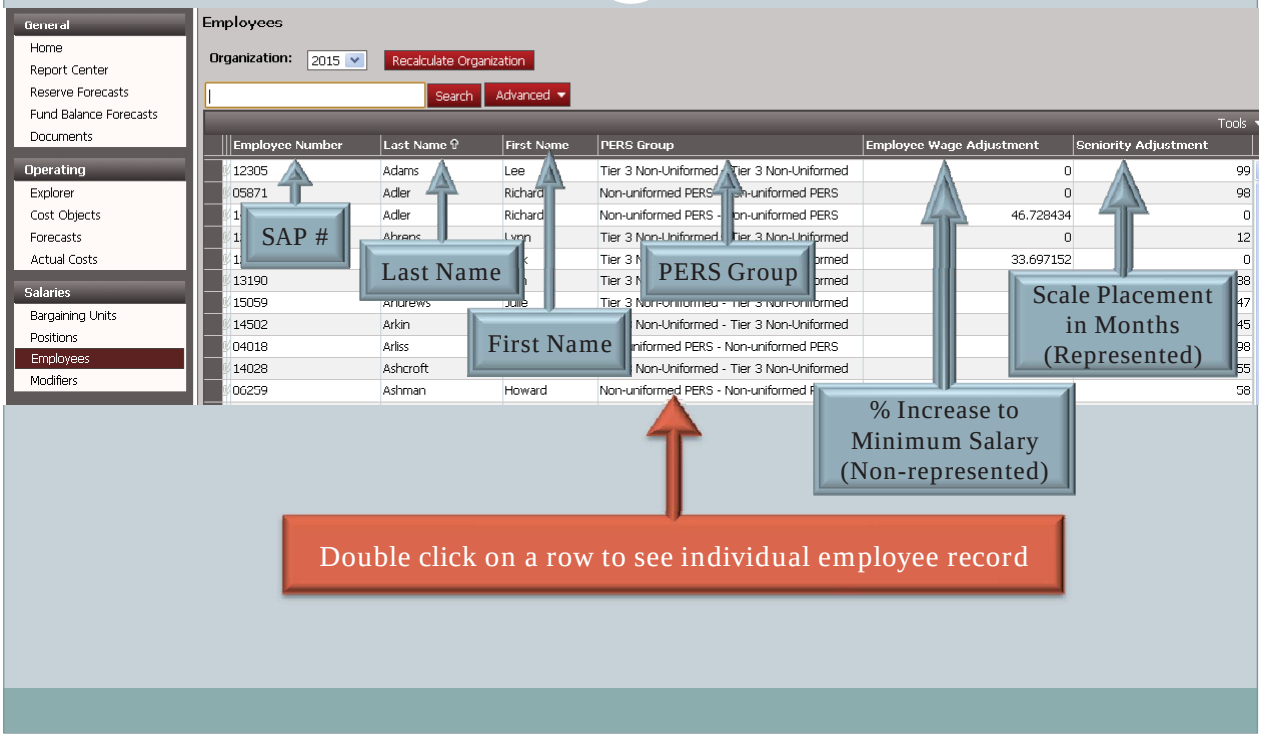
Individual Position Record

4



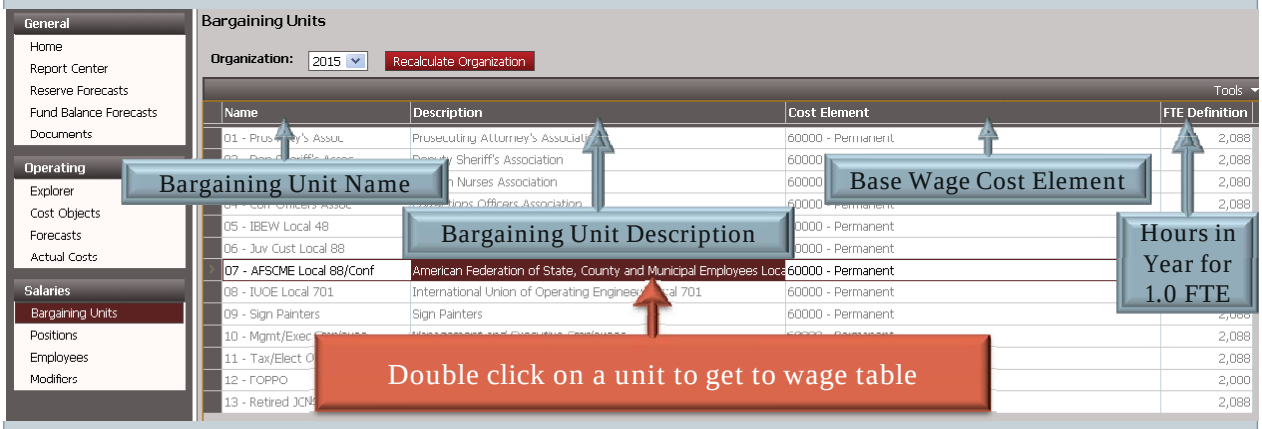
Employee Records Grid

5



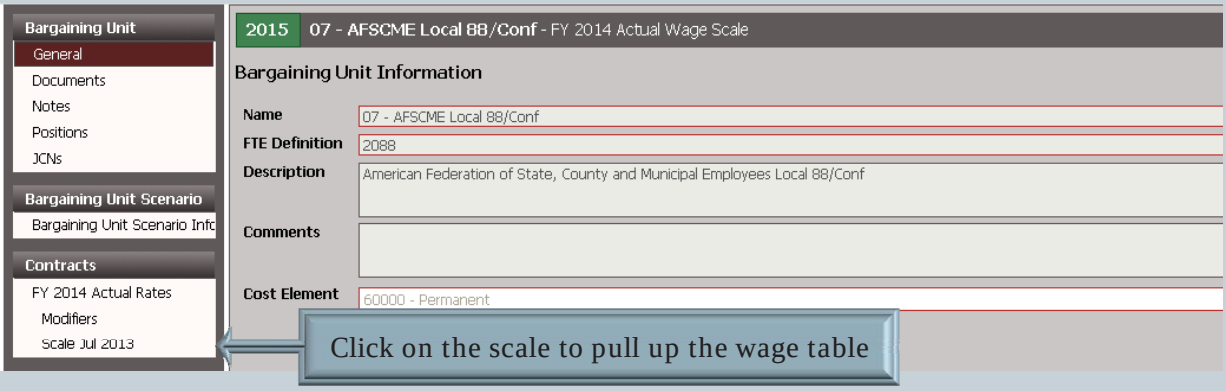
Bargaining Units Grid

6

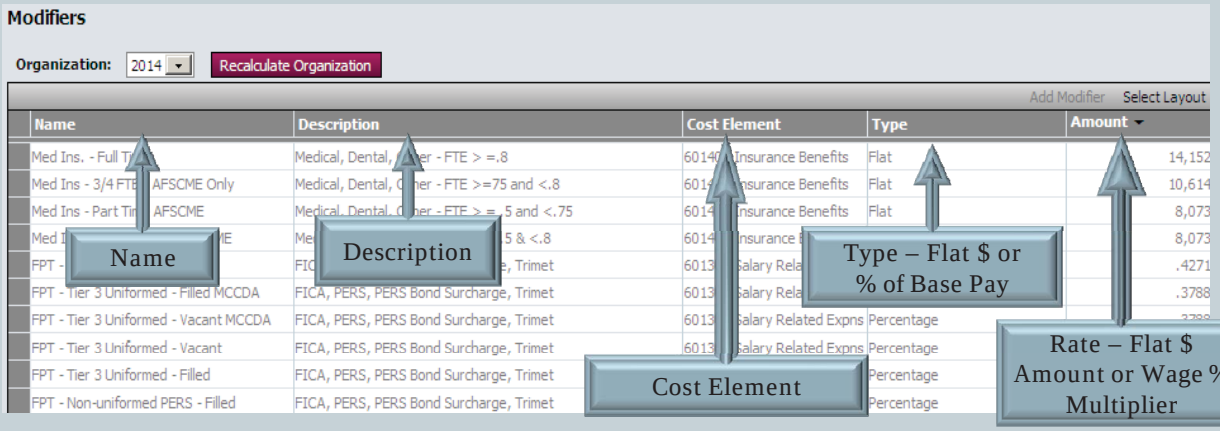


Bargaining Unit Detail

7



Click on the scale to pull up the wage table

Modifiers Grid

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