POSITION ENTRY INSTRUCTIONS---NBAPOSN

In order for employees to be hired for a job and paid from Banner HR, a position number must be established and assigned to the employee. Take the following steps to establish or change a University of Alaska position.

You can use two different methods to get from the main menu to the NBAPOSN form.

**Standard Method**
From the Main Menu in Banner:
1. Select “Human Resources System Menu”
2. Select “Position Management Menu”
3. Select “Position Definition Form” (NBAPOSN)

**Expert Method**
Type ‘NBAPOSN’ in the Direct Access field and press **Enter** to go directly to the NBAPOSN screen.

**FIELDS TO BE ENTERED ON NBAPOSN MAIN SCREEN**

**Position Class**: Enter the number of the position that is being either added or changed. If position is being added, the system will prompt “Position not found; ADD assumed.” Select **OK** or hit **Enter** to proceed and select the **Next Block** icon to go to the Compensation/Classification Information section.
Position Class: Enter the four-digit position class number. Observe that default information is shown for the position class. If the information shown is correct, Save the record.

Position Title: No entry required. Title of the position. The title will default after the Position Class has been entered.

NOTE: The title can be overridden to indicate a working title rather than a system title.

Employee Class: No entry required. The system will default once the position class information is entered. However, if temporary or labor pool positions are being established, you may have to change the employee class. Press Search to verify your choice.

Salary Group: No entry required. The system will default to the current year.

Salary Table: No entry required. The system will default from the information in the Position Class tables. However, if you are establishing a temporary or labor pool position, the salary tables may have to be changed. Press Search for the optional values.

Salary Grade: No entry required.

Salary Step: No entry required.

Reports To: No entry required.

Work Schedule: No entry required.

Appointment %: Enter percentage of appointment if less than 100%. The system will default to 100%. Save the data.

To go to the Regulatory Information screen, select the underlined text in the Options menu to the left.
NBAPOSN REGULATORY INFORMATION SCREEN

Position Group Code: No entry required. The EEO indicator will default.

CIPC: Entered for faculty only.

Federal Occupational Code: No entry required.

National Occupational Code: Current labor object (acct) code for the position. Enter the four-digit account code applicable to the type of position or select List for the optional values.

Occupational Title Code: This field is used for PACS reporting. Enter the program number applicable to the NCHEMS category of the position. This can be either a high-level or lower level program number to identify the department.

To go to the Position Budget form, select the underlined text in the Options menu to the left.

Revised 4/16/02
NBAPOSN POSITION BUDGET FORM

Fiscal Year: Enter the fiscal year and press the Next Block icon.

Status: Indicates budget status. Press the down arrow icon to view choices available. Use the mouse to select Active or use the up and down arrow keys and press Enter. Options are:

- Active
- Cancelled
- Frozen
- Inactive

Press Next Item.

Type: Choices are Single and Pooled. Single is the default. If the position is pooled, select Pooled.

COAS: Chart of Accounts. The only value available is B.

Begin Date: Beginning date of the position. Leave this field blank if you want the position to roll into the next fiscal year.

Salary: No entry required. The system defaults to Current Budget.

Premium Earnings: No entry required. The system defaults to Not applicable.
Authorized By: Enter the state PACS authorization number for regular positions. “POOL,” “EXT TEMP,” or blank may be used, depending on the type of position temporary being established.

Go to the next screen by pressing the **Next Block** icon.

**NBAPOSN POSITION SALARY BUDGETS INFORMATION SCREEN**

**Fisc:** Enter the current fiscal year (e.g., 2002).

**Status:** Indicates budget status. The options are:
- Approved
- Working
- Closed*
- Transferred*

Use **Approved** until the budget module is activated.

**COAS:** The system will default from COAS on the previous page. The only value available is **B**.

**Orgn:** Enter the low-level org number to identify NCHEMS “home” for the position. Press **Search** to see valid choices. This field is used to identify the MAU.

**Budget ID:** Enter “FY2002” (or the current fiscal year). This field will not be used until the budget module is activated.
**Phase:** Enter “FY2002” (or the current year). This field will not be used until the budget module is activated.

**FTE:** Enter the full-time equivalent of the position (you can enter up to 999 for pooled positions). Full-time equivalent normally will be **1.0**.

**Date Created:** Should be the same date as on Page 1 of he NBAPOSN form.

**Salary:** Enter budgeted salary for the position (can enter 0.00 as well), regardless of the distribution of funding.

Save the record. A warning will appear regarding budgeting for fringe benefits. Select **OK** or hit **Enter** to acknowledge warning.

To go to the **Position Labor Distributions** form, click on the underlined text in the **Options** menu to the left of the main screen.

**NBAPOSN POSITION LABOR DISTRIBUTION BLOCK**

To go to the **Position Labor Distribution** block, from the **Position Salary Budgets** form select the underlined text in the **Options** menu to the left.

**Index:** Leave blank.

**Fund:** Enter the fund number to which the position is to be charged, or leave blank and fund will default when the org number is entered (must override for 998000 fund).

Revised 4/16/02
Orgn: Enter the org number to which the position is to be charged.

Acct: Enter the object code (acct) of the position, the account number to which the position is assigned, which is the same as the Regulation form NOC code.

Program: The program number is associated with the org number and will default when the org is entered.

Use the scroll bar to view the following fields:

Actv: No entry required.

Locn: No entry required.

Project: No entry required.

Cost: No entry required.

Salary Budget: No entry required if the salary was entered in the Salary/Fringe Charge Back Totals. The system will show zero until a percentage is entered.

If the salary was not entered in the Salary/Fringe Charge Back Totals block, you must enter the salary in addition to the percentage charged to the fund/org/acct/prog information.

Percent: Enter the percentage of the position to be charged to this fund/org/acct/prog combination. If the percentage is less than 100%, press the Next Record icon and enter the line of fund/org/acct/prog information and related percentage.

---

Note: Do not assign percentages with more than two decimal places and always be sure that the total percentage equals 100.00%.

---

Save the data.

---

Note: This budget amount will be for information only. It will not feed to Finance. See Creating Budget in the Finance instructions for position budget updates to Finance. The distribution will not affect NBAJOBS in Existence. Please see Updating NBAJOBS Accounting distribution instructions.

Revised 4/16/02
Each campus will determine whether they will keep both the budgeted amount in NBAPOSN and the position record on Banner Finance in balance. It is not the intent of the Budget offices to use NBAPOSN for reporting budget in individual positions. This information will be provided by a report from Banner Finance.

NBAPOSN CHANGES

NOTE: In the event that the campus Budget office needs to make any changes to the original requisition, the Budget office must first notify the appropriate campus Applicant Tracking (AT) personnel of the required changes. To prevent the applicant records from begin disassociated with the requisition, the Budget and AT personnel should proceed as follows:

Once Budget has contacted AT, AT must delete all the applicant information for the requisition entered through PAAAPPL or PAAAPOS. The Budget office can then make the necessary changes to the requisition. Once the changes are made by Budget, the AT must reenter the applicants against the requisition through PAAAPL or PAAAPOS.

Fiscal Year: Enter the current fiscal year.

Position Number: Enter the position number to be changed. Press Next Block to bring up the position information.

Make changes as needed. The following fields may be changed to the Compensation/Classification Information:

- Eclass
- Salary Group
- Salary Table
- Salary Grade
- Salary Step
- Title
- Position Class

The position title may have to be retyped if the field isn’t cleared out first. Save the changes.

The following fields may be changed to the Regulatory Information:

- NOC Code
- Occupational Code
- Title Code (Program Number)
The following fields may be changed on the **Position Budget Form** (NBAPBUD):

- Status
- Effective Date of Position
- End Date

The following fields may be changed to **Position Salary Budgets**:

- FTE
- Salary (budgeted)—This field should be changed as the total budgeted in this position changes. Note that the amount in this field will be used in the distribution on page 3, based on the percentages in the distribution.
- Distribution fields including org/fund and percentage of total budget.

---

Note: Any changes to total budget amount will be for information only. The change will not feed to Finance. See **Creating Budget** in Finance instructions.

---

Each campus will determine whether they will keep both the budgeted amount in NBAPOSN and the position record on Banner Finance in balance. It is not the intent of the Budget offices to use NBAPOSN for reporting budget in individual positions. This information will be provided by a report from Banner Finance.
NBAJOBS Accounting Distribution

Accounting distribution information is entered on the NBAJOBS form. You can use the standard or the expert method to bring up the form.

**Standard Method**

From the Main Menu in Banner:

1. Select “Human Resources System Menu”
2. Select “Employment Administration Menu”
3. Select “Employee Jobs Form” (NBAJOBS)

**Expert Method**

Type “NBAJOBS” in the Direct Access field at top of any menu in Banner HR.

**ID:** Enter the Social Security number of the employee.

**Position:** Enter the position number for the specific job in which the distribution will be entered. You may list positions by selecting the Search icon and then selecting either List of all Positions or List of Employee’s Jobs (NBIJLST). Place the cursor in the Position field of the position you want and click the Select icon.

**Suffix:** Enter “00” for most positions.

**Query Date:** The system will default to today’s date. Enter a date of query if the information requested is prior to today’s date.

Press Next Block to get to the General Job Information block.

Press Next Block to get to the Job Detail Information block.

**Effective Date:** Shows the period included in the distribution to be entered (based on the position entered above). Make sure the distribution you are entering is tied to the correct sequence of this job. Personnel will have entered this information, and you will not change any information in any of the blocks on NBAJOBS now except for account distribution. If the correct dates cannot be found, send the document to Personnel for their entry.

Once this effective date is identified, proceed to the Job Labor Distribution block by pressing Next Block four times. Or, select the underlined text in the Options menu to the left.

The Job Labor Distribution block will reflect the information for the effective date on the main NBAJOBS screen. The distribution can be changed for any time within the
effective dates of the information on that screen. It is critical that the correct effective date be identified in both places.

**NEW DISTRIBUTION**

Enter the distribution for the time frame of this job.

**COAS:** Chart of Accounts The system will default to B, which is correct.

**Index:** No entry required.

**Fund:** Enter the appropriate fund. Search the list of funds by pressing the Search icon. Limit your search by using standard Banner search methods. The default fund should default to this field when the correction to the system takes place. Then you will only need to enter an override fund.

**Orgn:** Enter the appropriate org code. Search the list of funds by pressing the Search icon. Limit your search by using standard Banner search methods. The fund number will default based on the org selected. The fund number can be overridden. The program code must not be overridden.

**Acct:** Enter the appropriate object code. This field should match the position record.

**Program:** The program code will default when the org is entered. If you change the org, make sure that the program code changes correctly to the default for that org.

**Percent:** Enter the percent of distribution. If more than one org/fund number is needed for the time period, enter the first line and arrow down to the next line. Enter the information for the subsequent org/fund combinations along with the percentage of distribution for this time period. The total percentages keyed for this time period must equal 100%.

If there is more than one distribution start date in this NBAJOBS sequence, enter the first time period as indicated above, and then follow the instructions below for **Changing a Distribution.**

**CHANGING A DISTRIBUTION**

Follow the instructions on the previous page for getting to the Job Labor Distribution block on the NBAJOBS form.

In the Options menu to the left, select “Add a Change with a New Effective Date.” A window will appear. Enter a new effective date. Select OK.
The distribution will duplicate the distribution from the previous record. Now that you can either enter the correct distribution, change the percentage, or delete lines, as needed, and **Save**.

**Reminder:** To delete a distribution line, be sure your cursor is on the line to be deleted and press the **Delete Record** icon. Note that you cannot insert a distribution; you can only add effective dates after the latest effective date that has been entered. You cannot go back with a distribution record to before the last paid date. You can delete current (unpaid) dates, enter the missing distribution, and re-enter the later distribution dates.

### CHECKING THE DISTRIBUTION RECORD

**Standard Method**
From the Main Menu in Banner:
1. Select “Human Resources System Menu”
2. Select “Employment Administration Menu”
3. Select “Labor Distribution Change History” (NBIJLHS)

**Expert Method**
Type “NBIJLHS” in the **Direct Access** field at the top of any Banner menu.

From here or from the distribution record, you can select **View List of Effective Dates** from the underlined text in the Options menu to the left to see the effective dates for the distribution.

**ID:** Enter the Social Security number of the employee.

**Name:** This field will default from the Social Security number.

**Posn:** Enter the position number for the job.

**Date:** This date is a query date, and it determines which records to display. Be sure this date is early enough to display all pertinent information.

Press **Next Block** to get to the **Job Labor Distribution Change Information** block. Here, you may enter why the distribution changed. This screen will show the effective date for distribution changes for a position. The cursor points at the effective date, and the distribution shows in the **Job Labor Distribution Detail Information** block.

*Revised 4/16/02*
Arrow up/down or use the scroll bar to get to the next date (or to the date you are interested in), and the distribution information associated with the date will appear at the bottom of the form.

**Remember:** The Option menu choices to the left will change depending on the block where the cursor rests.
QUERY INSTRUCTIONS

The following forms may be accessed from the Banner HR Position Management Menu or may be accessed directly by typing the form name in the **Direct Access** field.

**NBAPOSN**

NBAPOSN is the form used to establish positions. See the entry instructions.

**NBICLSH**

NBICLSH provides a history of the changes made to a position class (i.e., if the title changes, ECLS changes, skill level, position group, etc.).

Enter the 4-digit position class code and query date. (Next Block) will bring up the history information.

**NBIPINC**

NBIPINC provides a history of individuals assigned to a particular position number. The form cannot be accessed from the Option menu. To bring up this form, select **Position Incumbent List Form** from the Position Management Menu or type “NBIPINC” from the **Direct Access** field on any main Banner menu.

*Revised 4/16/02*
Enter the 6-digit position number and specific query date. Information prior to the query date will not be shown. **Next Block** will bring up the history information.

**NBIPLST**

NBIPLST provides a listing of all positions assigned to a particular position class.
Enter the 4-digit PCLS and query date. **Next Block** will display the requested information.

**NBIPORG**

PBIPORG is not recommended for use.

**NBIPOSH**

NBIPOSH provides a listing of all changes to the parameters of a position.

Enter the 6-digit position number. **Next Block** will display the requested information.