UNIVERSITY OF
TEXAS
ARLINGTON

Split Allocation Position Funding in EPM

The purpose of this job aid is to explain how to update, create, and delete split-allocation position funding in EPM.

NOTE: Changes are updated in real-time.

Update Existing Split Allocation for Position

1. From the EPM 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.

8. Change the distribution percentages.

Before Change	After Change, Not Saved
Distrb % 42% 58%	Distrb % 60% 40%

9. Click the **Save** button.

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

> ⓘ **Information**
> Messages for this page are listed below.
> ⓘ The data has been saved.
> ⓘ Rule was run successfully
>
> **OK**
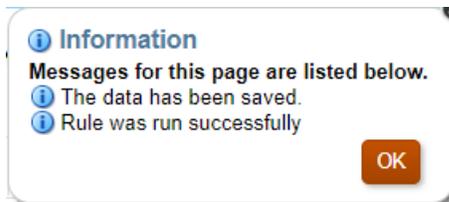
11. If position is in the same department, the distribution can be updated at the same time. If the position is in different departments, it must be updated separately.

Create New Split Allocation for Position

1. From the EPM 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.

	Existing Positions by Departme...	Existing Positions by Cost Cen...	Departments by Position	New Po

Existing Positions by Department ⓘ
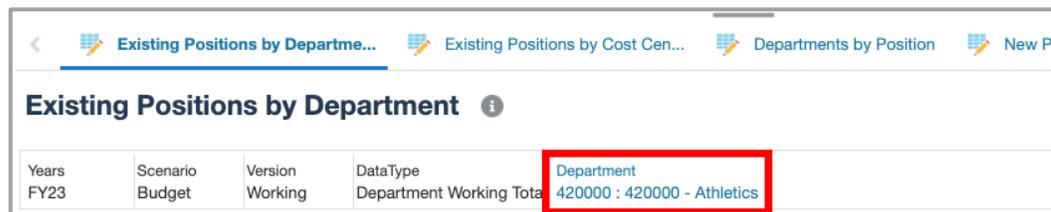
Years	Scenario	Version	DataType	Department
FY23	Budget	Working	Department Working Total	420000 : 420000 - Athletics

   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 click **OK**.

5. The Department field will be yellow, indicating the changes have not been saved. Click the gray "Go" arrow to update the form for the new department.

6. To locate the position you want to edit, scroll down the data form or click the Search icon and enter the Position ID.

7. Highlight the row with the Position ID.

8. Right click and select **Copy Position**.

The **Action Menu – Copy Position Ruleset** page is displayed.

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

9. 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**.

10. Click the **Launch** button.

11. 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 exist within security, you can change the view to departments by position to manage one department at a time. Remember that there is no immediate audit to identify over 100% allocation.

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

13. Click the **Save** button. A confirmation window appears ""*The data has been saved*", click **OK**.

14. Review in "Existing Positions by Department" or "Existing Positions by Cost Center".

NOTE: If NO combo code loads automatically, the department and cost center do not currently tie together. Contact your Budget Resource immediately as the combo code is extremely important.

Delete Split Allocation Funding for Position

This action would be used when a split funded position no longer needs 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.

NOTE: This will not delete the position in its entirety, but only from the selected cost center. You will need to locate the other funding source(s) and adjust the distribution as necessary.

4. Box will pop up for verification.
5. Once verified, click **Launch**. A confirmation window appears.

Remember to go back, if not already done, 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 Departments by Position or going back into 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.