

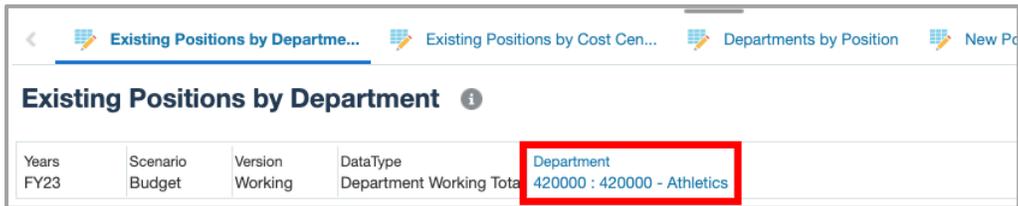
Split Allocation Position Funding in EPM

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.

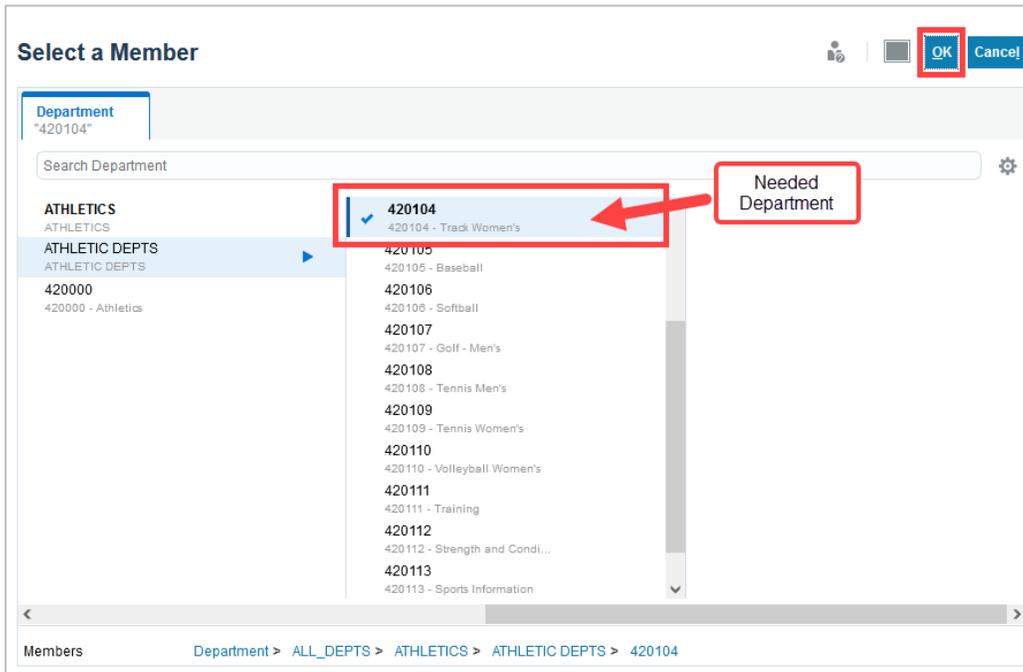
Update Existing Split Allocation for Position

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.



Years	Scenario	Version	Data Type	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 then click **OK**.



Select a Member

Department: "420104"

Search Department

ATHLETICS

- ATHLETICS
- ATHLETIC DEPTS
- ATHLETIC DEPTS
- 420000
- 420000 - Athletics

420104 ✓ 420104 - Track Women's

420105 420105 - Baseball

420106 420106 - Softball

420107 420107 - Golf - Men's

420108 420108 - Tennis Men's

420109 420109 - Tennis Women's

420110 420110 - Volleyball Women's

420111 420111 - Training

420112 420112 - Strength and Condi...

420113 420113 - Sports Information

Members Department > ALL_DEPTS > ATHLETICS > ATHLETIC DEPTS > 420104

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.

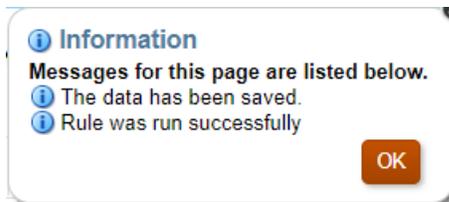
Before Change

Distrb %
42%
58%

After Change, Not Saved

Distrb %
60%
40%

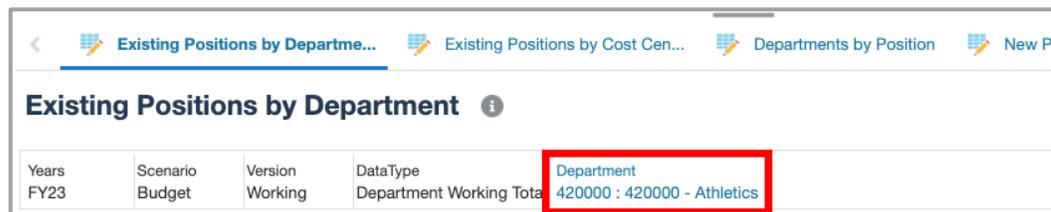
- Click the **Save** button.
- A confirmation window appears *“The data has been saved”*, click OK.



- 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.

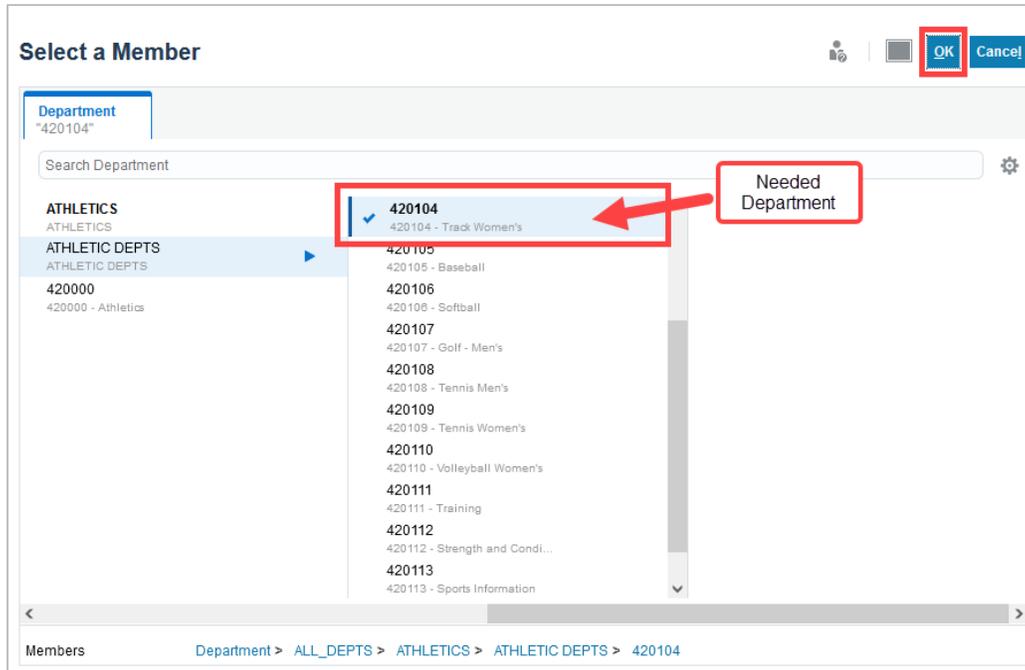
Create New Split Allocation for Position

- From the EPM homepage, select the **Departmental Budget** icon.
- Select the **Position Budget Forms** icon.
- Click **Existing Position by Department** or **Existing Position by Cost Center** on the menu.
- If necessary, click the Department area to locate your department.



Years	Scenario	Version	Data Type	Department
FY23	Budget	Working	Department Working Total	420000 : 420000 - Athletics

- 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 click **OK**.



Select a Member

Department
"420104"

Search Department

ATHLETICS
ATHLETICS

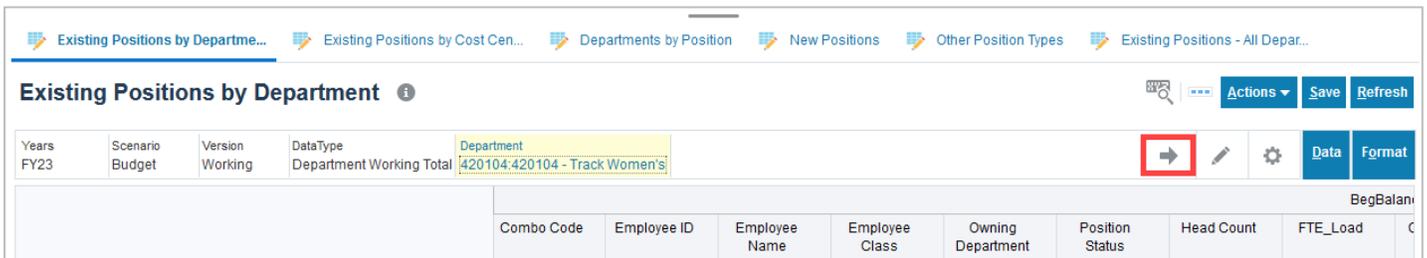
ATHLETIC DEPTS
ATHLETIC DEPTS

420000
420000 - Athletics

420104 - Track Women's
420105 - Baseball
420106 - Softball
420107 - Golf - Men's
420108 - Tennis Men's
420109 - Tennis Women's
420110 - Volleyball Women's
420111 - Training
420112 - Strength and Condi...
420113 - Sports Information

Members Department > ALL_DEPTS > ATHLETICS > ATHLETIC DEPTS > 420104

- 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.

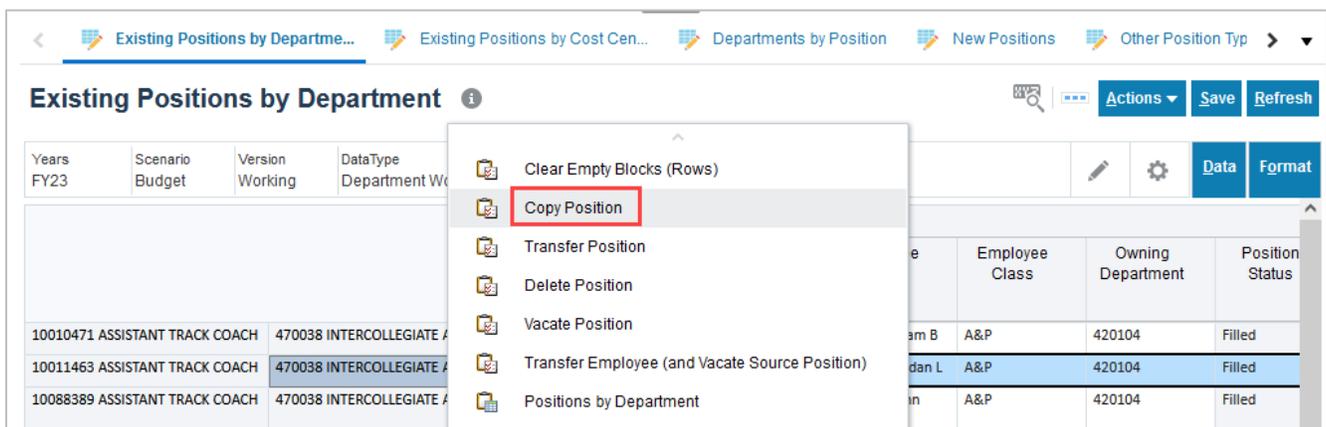


Existing Positions by Department

Years: FY23 Scenario: Budget Version: Working DataType: Department Working Total Department: 420104:420104 - Track Women's

Combo Code	Employee ID	Employee Name	Employee Class	Owning Department	Position Status	Head Count	FTE_Load	BegBalanc

- 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**.



Existing Positions by Department

Years	Scenario	Version	DataType	Department Working Total	Employee Class	Owning Department	Position Status
FY23	Budget	Working	Department Working Total	420104:420104 - Track Women's			

Context Menu:

- Clear Empty Blocks (Rows)
- Copy Position**
- Transfer Position
- Delete Position
- Vacate Position
- Transfer Employee (and vacate Source Position)
- Positions by Department

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.



Action Menu - Copy Position Ruleset

* Select Position "P10011463"

* Destination Cost Center "C123456"

* Destination Department "420104"

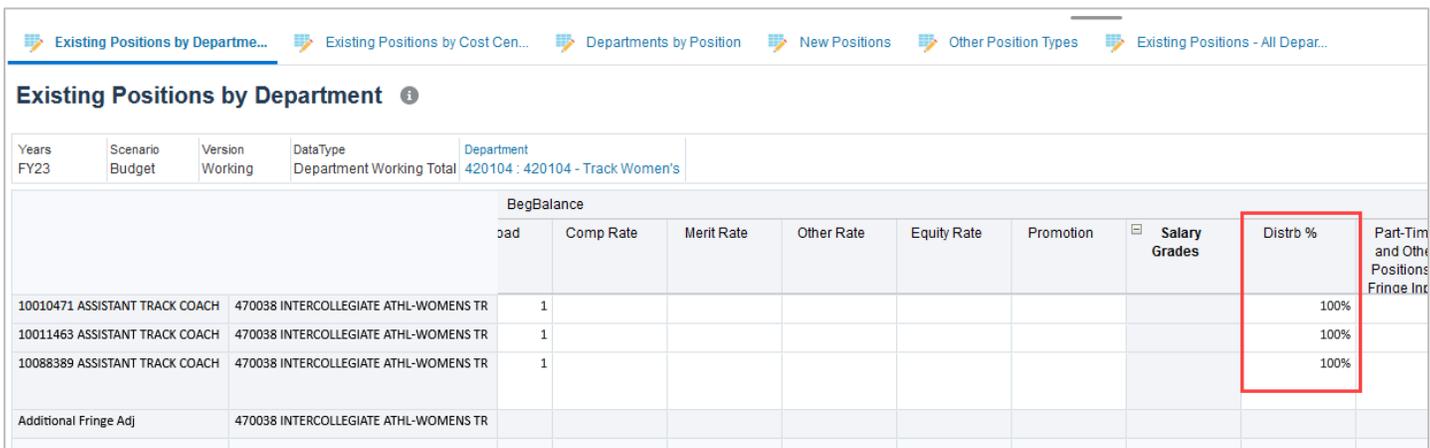
* Source Cost Center "C470038"

* Source Department "420104"

* Select DataType "Department Working Total"

Launch **Cancel**

11. A message displays that the copy was successful, and the position now displays two different allocation lines. **Adjust the distribution accordingly.**



Years	Scenario	Version	DataType	Department	BegBalance							Part-Tim and Other Positions Fringe Inc	
FY23	Budget	Working	Department Working Total	420104 : 420104 - Track Women's	pad	Comp Rate	Merit Rate	Other Rate	Equity Rate	Promotion	Salary Grades	Distrib %	
												100%	
												100%	
												100%	

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 **Distrib %** 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”.

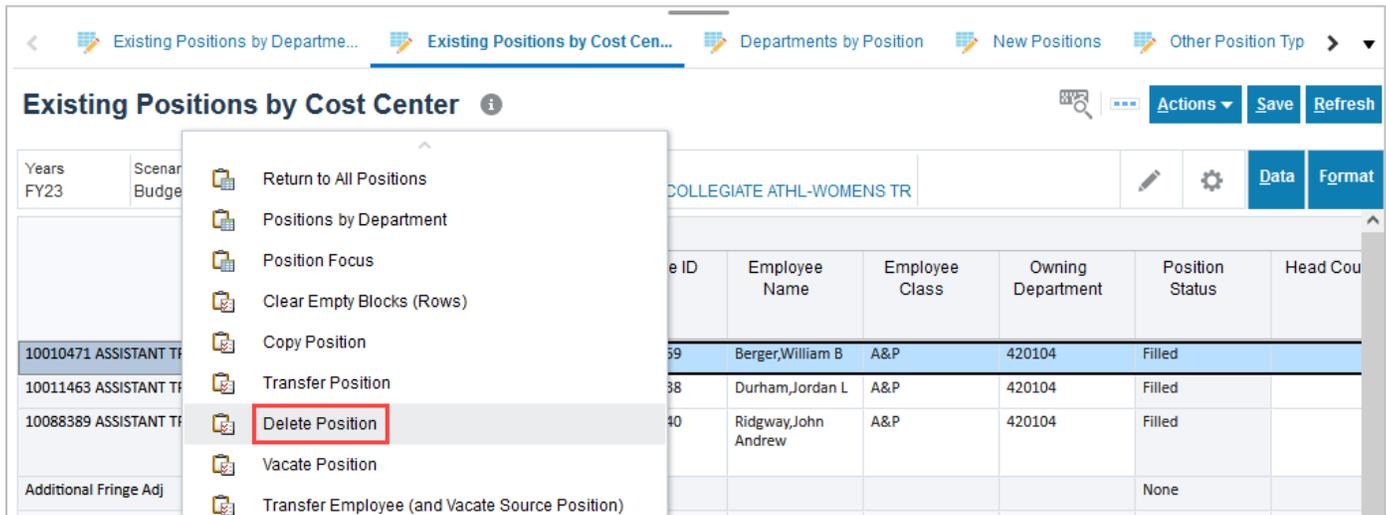
NOTE: If NO combo code loads automatically, the department and cost center do not currently tie together. Contact your Budget Resource immediately as the combo code is extremely important.

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.



Existing Positions by Cost Center

Years: FY23 | Scenario: Budget

COLLEGIATE ATHL-WOMENS TR

Employee ID	Employee Name	Employee Class	Owning Department	Position Status	Head Count
10010471	ASSISTANT TR				
10011463	ASSISTANT TR				
10088389	ASSISTANT TR				
39	Berger, William B	A&P	420104	Filled	
38	Durham, Jordan L	A&P	420104	Filled	
40	Ridgway, John Andrew	A&P	420104	Filled	
				None	

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.