

Human Capital Management: Step-by-Step Guide

Entering a Funding Distribution Change – Department Budget Table

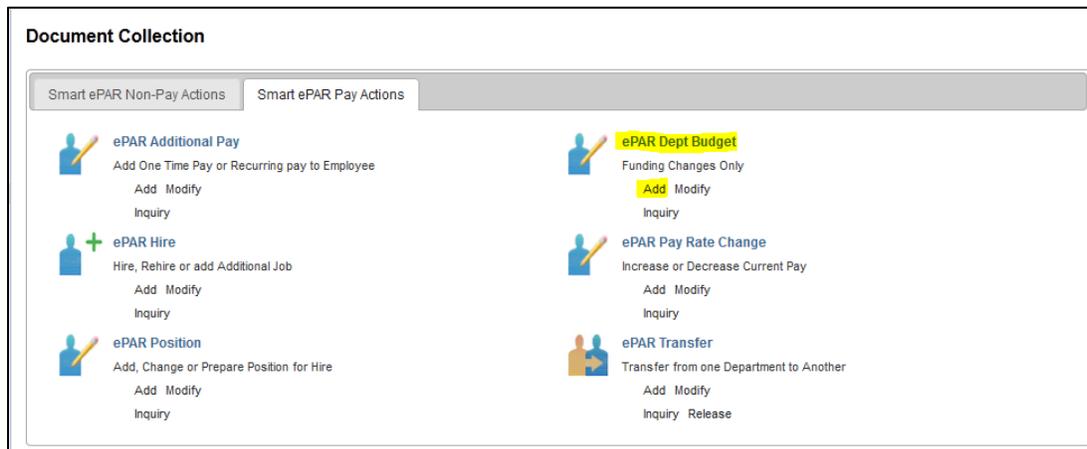
This guide describes the process for entering a Funding Distribution Change using an ePAR Pay Action.

Before you begin, here are a few tips:

-  The magnifying glass is called a look up and displays search results for you to select valid field values.
-  The book and checkmark lets you spell check text boxes.
-  The trashcan lets you remove an item.
-  The down arrow lets you hide, or collapse, sections you do not want to view.
Click the  arrow to expand the section.

Beginning the Transaction

1. Navigation: **Main Menu> Smart Solutions> Document Framework> Document Collection.**
2. Select the **Smart ePAR Pay Action** tab.
3. Under ePAR Dept Budget (Funding Changes Only), click **Add**.



Step 1: Dept. Budget Selection

1. Enter your Search Criteria:

2. Click **Search**.
3. Verify the information is correct.

	Department	Fiscal Year	Position	Descr
1	10112	2016	00611999	Professor
2	10112	2015	00611999	Professor
3	10112	1	00611999	Professor

4. Make sure the select checkbox appears selected for your position:

Search Results					Personalize Find	First	1-363 of 363	Last
	Department	Fiscal Year	Position	Descr				
39	51000	2016	00706444	Business Services Senior Prof	<input type="checkbox"/>			
40	51000	2016	00707164	Project Manager	<input type="checkbox"/>			
41	51000	2016	00708475	Business Services Program Mgr	<input checked="" type="checkbox"/>			

5. Click **Next**.

Next

Step 2: Dept. Budget Collection Current Data

1. From the **Action** list, select **Earnings Distribution Change**.
2. If you are changing the funding as of the Effective Date shown under Dept Budget Current Info section (otherwise proceed to the next step):
 - a. From the **Reason** list, select **Change Funding**.
 - b. Select the **Effective Date** checkbox.

Create ePAR Dept Budget Request
Step 2 of 3: ePAR Dept Budget Collection Current Data

Transaction Details

PAR Action:	Department Budget	Action:	Earnings Distribution Change	Document ID:	ePAR Dept Budget
Request ID:	NEXT	Reason Code:	Change Funding	Document Instance:	0
ePAR Status:	Initial	Effective Date:	09/03/2015	Document Status:	Initial / Add Entry
		Effective Seq:	0		

Department Budget Details

Department:	10112	Dept. Title:	Museum-Administration	Last Personnel Action:	
Position:	00611999	Name:Position Title:	Professor	Last Transaction Date:	
	Historical ePARs		Pending ePARs		

Action/Reason Selection

*Action: **Earnings Distribution Change** *Reason: **Change Funding**

Dept Budget Current Info Find First 1 of 1 Last

Effective Date: 07/01/2015 Effseq: 0 Budget Level Cap:

Current Funding Personalize | Find | First 1-2 of 2 Last

Department	Project/Grant	Speedtype	Account	Fund Code	Program Code	Distribution %	Funding End Date
1 10112		11020765	444444	10	10898	7.500	
2 10099		11077624	444444	10	42774	92.500	

Previous Next

Audit Details

Entered By:	Updated By:
Entered On:	Updated On:

CI Save

3. If you are changing the funding and require a different Effective Date:
 - a. From the **Reason** list, select **New Effective Date**.
4. Click **Next**. Next
5. If you selected **New Effective Date**, click the **Add New Effective Date Funding** button, and then enter the new date.

Dept Budget Find First 1 of 1 Last

Effective Date: 01/01/2016 Effseq: 0

Current Funding Personalize | Find | First 1 of 1 Last

Department	Project	Speedtype	Account	Fund Code	Program Code	Distribution %	Funding End Date
1 51005		51090507	444444	10	47316	100.000	

New Funding Same as Current Funding Amt Pct

New Funding Personalize | Find | First 1 of 1 Last

Budget Amount	Department	Project	Speedtype	Product	Account	Fund Code	Program Code	Distribution %	Funding End Date
1									

Previous

Step 3: Dept. Budget Collection New Data

If you selected the **Amt** option, the following fields become editable:

- Budget Amount
- Department
- SpeedType

Save Collaborate Attach Process

Create ePAR Dept Budget Request

Step 3 of 3: ePAR Dept Budget Collection New data

Transaction Details

PAR Action: Department Budget Action: Earnings Distribution Change Document ID: ePAR Dept Budget
 Request ID: NEXT Reason Code: Change Funding Document Instance: 0
 ePAR Status: Initial Effective Date: 09/03/2015 Document Status: Initial / Add Entry
 Effective Seq: 0

Department Budget Details

Department: 10112 Dept. Title: Museum-Administration Last Personnel Action:
 Position: 00611999 Name:Position Title: Professor Last Transaction Date:
 Historical ePARs Pending ePARs

Dept Budget Find First 1 of 1 Last

Effective Date: 07/01/2015 Effseq: 1

Current Funding Personalize Find 1-2 of 2 Last

Department	Project/Grant	Speedtype	Account	Fund Code	Program Code	Distribution %	Funding End Date
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New Funding Same as Current Funding Amt Pct

New Funding Personalize Find 1-2 of 2 Last

Budget Amount	Department	Project/Grant	Speedtype	Product	Account	Fund Code	Program Code	Distribution %	Funding End Date
	10112		11020765		444444	10	10898	7.500	
	10099		11077624		444444	10	42774	92.500	

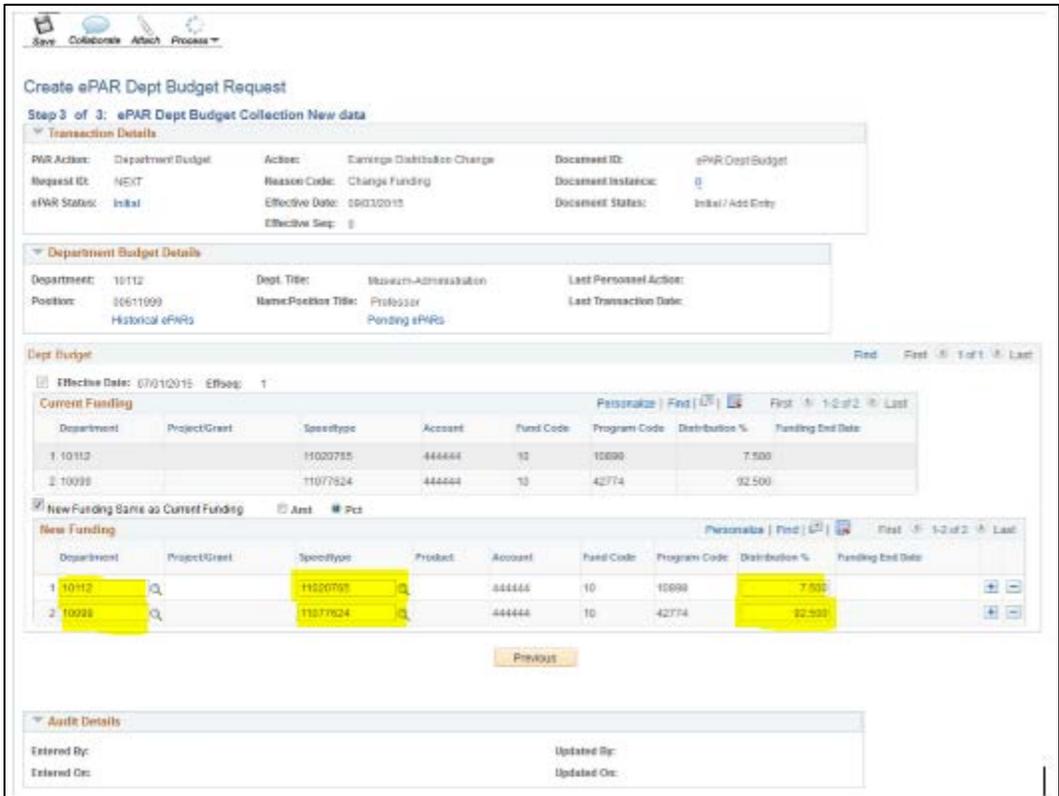
Previous

Audit Details

Entered By: Updated By:
 Entered On: Updated On:

If you selected the **Pct** option, the following fields become editable:

- Department
- SpeedType
- Distribution %

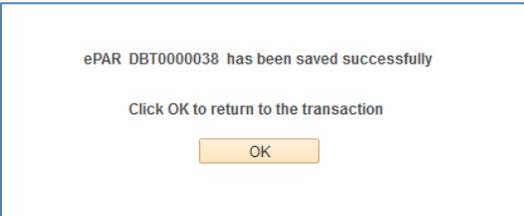


Step 4: Saving and Submitting the Transaction

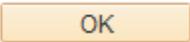
1. Complete your changes, and click **Save** from the top left corner.



You will receive your ePAR Document number:



2. Click **OK**.



3. Click **Submit**.

