

BP.030.002 - POSITION BUDGET MANAGEMENT HCM REFRESH

Purpose	To refresh salary, incumbent, and funding information in Position Budget Management from OneUSG Connect.
Description	Budget, encumbrance, and expense information in Position Budget Management update in real-time, but HR information needs to be refreshed to reflect new hires, terminations, funding changes, and salary changes.
Security Role	BOR_PB_PROCESSING
Dependencies/ Constraints	 Initial setup and refresh completed. Budget data requires that budget journals include Position Number detail in the Ref field.
Additional Information	None





Procedure

Below are complete step-by-step instructions on running the Position Budget Management HCM Refresh.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the BOR Menus link.
4.	Click the BOR Position Budget Mgmt link.
5.	Click the Position Budget Setup link.
6.	Click the Year Parameters link.
7.	Enter the appropriate Business Unit in the Business Unit field.
8.	Click the Search button.
9.	Enter the needed refresh date in the As Of Date field. This field controls the maximum effective date of salary, incumbent and funding data refreshed from OneUSG Connect.
10.	After all changes are made, click the Save button.
11.	Click the NavBar to navigate.
12.	Click the Navigator icon.
13.	Click the BOR Menus link.
14.	Click the BOR Position Budget Mgmt link.
15.	Click the Position Budget Process link.
16.	Click the HCM Refresh link.
17.	The Run Control ID page opens. Add a new value or use an existing Run Control ID.
18.	Select the Create Report/Run HCM Refresh option.
19.	Enter the appropriate Business Unit in the Business Unit field.
20.	Click the Run button. The Process Scheduler Request page opens.
21.	Verify default values pre-populate.
22.	Click the OK button. The system navigates to the HCM Refresh page.
23.	Click the Process Monitor link.
24.	Click the Refresh button. Select Refresh until the Run Status displays as 'Success' and the Distribution Status displays as 'Posted.'
25.	Click the Details link to view the Process Detail.
26.	Click the View Log/Trace link.
27.	Review the .out format file for a list of any positions that failed to import – salary and incumbent data for these are not included in Position Budget Management until corrections are made to Job data.