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## BP.030.002 - POSITION BUDGET MANAGEMENT HCM REFRESH

<b>Purpose</b>	To refresh salary, incumbent, and funding information in Position Budget Management from OneUSG Connect.
<b>Description</b>	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.
<b>Security Role</b>	<b>BOR_PB_PROCESSING</b>
<b>Dependencies/ Constraints</b>	<ul style="list-style-type: none"> <li>Initial setup and refresh completed.</li> <li>Budget data requires that budget journals include Position Number detail in the Ref field.</li> </ul>
<b>Additional Information</b>	None

## Procedure

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

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> icon.
3.	Click the <b>BOR Menus</b> link.
4.	Click the <b>BOR Position Budget Mgmt</b> link.
5.	Click the <b>Position Budget Setup</b> link.
6.	Click the <b>Year Parameters</b> link.
7.	Enter the appropriate Business Unit in the <b>Business Unit</b> field.
8.	Click the <b>Search</b> button.
9.	Enter the needed refresh date in the <b>As Of Date</b> 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 <b>Save</b> button.
11.	Click the <b>NavBar</b> to navigate.
12.	Click the <b>Navigator</b> icon.
13.	Click the <b>BOR Menus</b> link.
14.	Click the <b>BOR Position Budget Mgmt</b> link.
15.	Click the <b>Position Budget Process</b> link.
16.	Click the <b>HCM Refresh</b> link.
17.	The Run Control ID page opens. Add a new value or use an existing <b>Run Control ID</b> .
18.	Select the <b>Create Report/Run HCM Refresh</b> option.
19.	Enter the appropriate Business Unit in the <b>Business Unit</b> field.
20.	Click the <b>Run</b> button. The Process Scheduler Request page opens.
21.	Verify default values pre-populate.
22.	Click the <b>OK</b> button. The system navigates to the HCM Refresh page.
23.	Click the <b>Process Monitor</b> link.
24.	Click the <b>Refresh</b> button. Select Refresh until the Run Status displays as 'Success' and the Distribution Status displays as 'Posted.'
25.	Click the <b>Details</b> link to view the Process Detail.
26.	Click the <b>View Log/Trace</b> 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.