

ROCS – GUIDE TO BUDGET ROLE

I. THE ROLE OF BUDGET IN ROCS

In ROCS the role of Budget is to view and edit the “Position Budget Information” tab. An initiator will start a position request, a posting, or a hiring proposal that may need to approval of the Budget role.

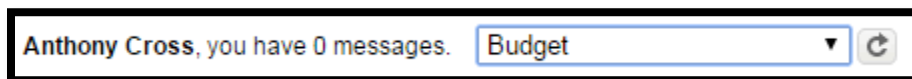
When another role moves a requisition to the Budget role the individual who was selected in the Budget office will receive an e-mail informing them that they have received an approver request.

Step One

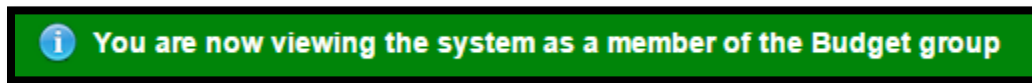
Follow the link: <https://jobs.rutgers.edu/hr/shibboleth> and login with your NetID and Password.

Step Two

In the top right area of the screen select the Budget role from the drop-down menu and hit the refresh arrow.

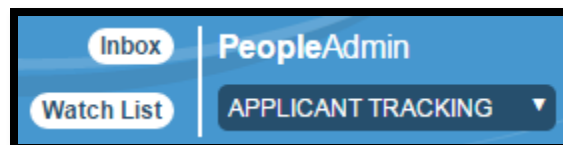
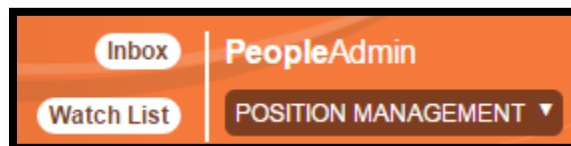


You will see a green success status bar at the top of the screen once you are in the Budget role.



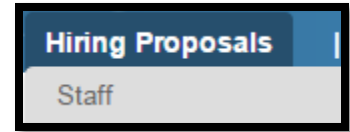
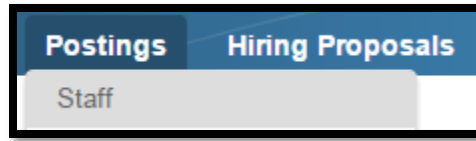
Step Three

Once in the Budget role you must navigate to the requisition you need to approve. Depending on what type of requisition you must approve you will need to navigate to that module. For Position Descriptions make sure you are in the “Position Management Module” (indicated by an orange system banner), for Postings and Hiring Proposals make sure you are in the “Applicant Tracking Module” (indicated by a blue banner). Use the drop down field located in the top-right area of the screen to select the module.



Step Four

Navigate to the Position Description/Posting/Hiring Proposal by using the tabs at the top of the screen.



For “Position Descriptions” select “Staff Position Requests”, for “Postings” select “Staff”, and for “Hiring Proposals” select “Staff”. You will see requisitions that have been assigned to you in.

Step Five

Select the “Posting Name”, “Position Request Name”, or the applicant’s “Last Name” to access the budget information for that requisition.

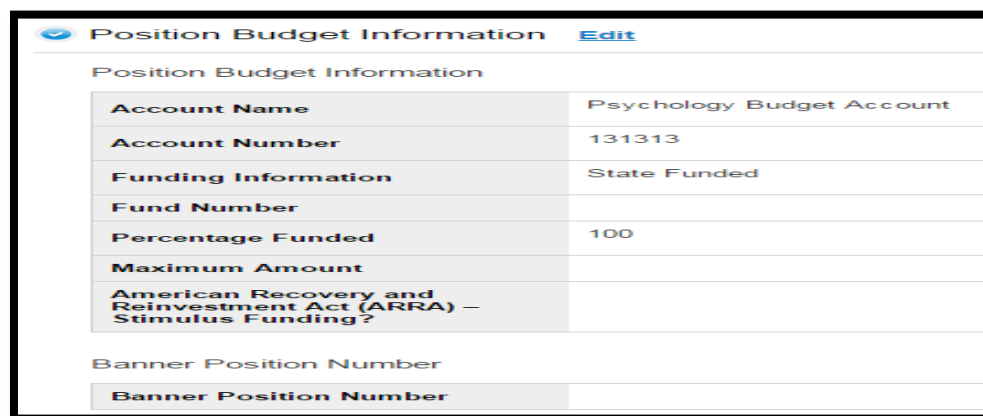
<input type="checkbox"/>	Posting Name	Posting Number	Department
<input type="checkbox"/>	Research Project Coordinator (Training)	15ST1015	SAS - Psychology-Child Study

Position Request Name	Department	Last Updated
New Position Description: Research Project Coordinator (Training)	SAS - Psychology-Child Study	February 18, 2015 at 09:26 AM

<input type="checkbox"/>	Last Name	First Name	Status
<input type="checkbox"/>	Diggory	Cedric	Draft

Step Six

Navigate to the “Position Budget Information” tab by scrolling down the “Summary Tab” to view the budget information entered by the initiator.



A screenshot of a web form titled "Position Budget Information" with an "Edit" link. The form contains the following fields:

Account Name	Psychology Budget Account
Account Number	131313
Funding Information	State Funded
Fund Number	
Percentage Funded	100
Maximum Amount	
American Recovery and Reinvestment Act (ARRA) – Stimulus Funding?	
Banner Position Number	
Banner Position Number	

If the information was entered correctly skip to **Step Seven**, if you need to make edits to the budget information or add another budget entry click the blue “Edit” link to the right of “Position Budget Information.

Once you click “Edit” you will be brought to the “Position Budget Information” section. Here you will be able to make changes or add information that may have been forgotten. To add another set of fields click the gray “Add Position Budget Information Entry”. To delete a set of fields check the box that says “Remove Entry”.

Position Budget Information

Account Name Psychology Budget Account

* Account Number 131313

* Funding Information State funded

Fund Number (Banner Only)

Percentage Funded 100
Enter a number with a maximum of 3 digits.

Maximum Amount

American Recovery and Reinvestment Act (ARRA) – Stimulus Funding?

Remove Entry?

Add Position Budget Information Entry

Banner Position Number

Banner Position Number

Save << Prev Next >>

Note: When entering numbers in the “Percent Funded” field please do **not** use the “%” sign and enter whole numbers with an extra decimal point, so for 25 percent just enter “25.0”.

When finished with the updates click “Save” – make sure to hit “Save” or any changes you made will not carry over. Scroll up to the requisition’s navigation tab.

Editing Posting

- Position Details
- Reference Letter
- Position Budget Inform...
- Posting Specific Quest...
- Applicant Documents
- Guest User
- Search Committee
- Search Evaluative Crit...
- Summary

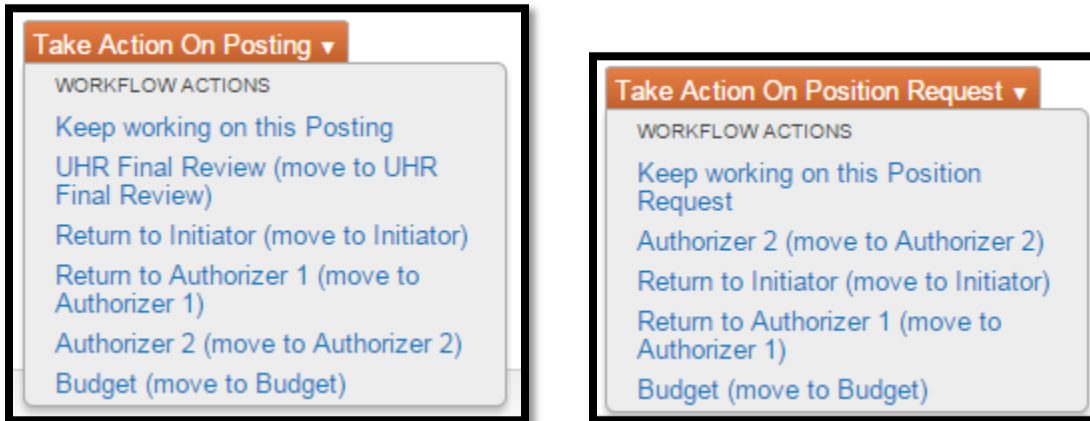
Editing Position Request

- Classification Selection
- Position Details
- Position Budget Inform...
- Position Documents
- Position Request Summary

Click “Summary” to navigate to the requisition’s “Summary Tab”.

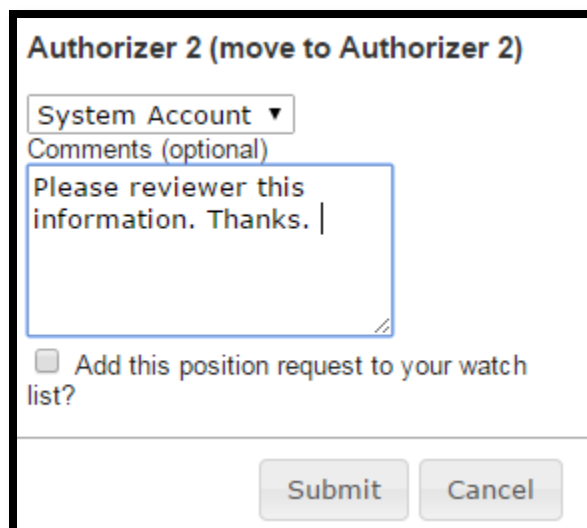
Step Seven

The next and final step is to send the requisition onto the next approver. On the requisition's "Summary Tab" toggle over the orange action button



Select the approver you want to send the request to. However, if you want to send it to another Budget role holder in your office you must select "Keep working on this Posting". For Example:

You select "Authorizer 2 (move to Authorizer 2)". A box will appear with several options. You will have to select which Authorizer 2 should receive the request – this is done by using the drop down field that currently say "System Account" in the image below. You may also enter a comment which will be saved to the requisition and be sent to the next approver. Lastly you make also check the box to add the requisition to your watch list.



The image shows a dialog box titled "Authorizer 2 (move to Authorizer 2)". It contains a dropdown menu with "System Account" selected, a text area for "Comments (optional)" with the text "Please reviewer this information. Thanks.", a checkbox labeled "Add this position request to your watch list?", and two buttons at the bottom: "Submit" and "Cancel".

Select "Submit" to move the requisition onto the next approver.