

# **MUNIS**

## **Position/ Budget Request Form (PBR)**

### **User Manual**

**Updated – November 2018**

## **Introduction**

The Munis Position/Budget Request Form (PBR) module replaces the use of all paper forms currently used to request:

- A Budget Transfer of funds from one account to another (BT)
- An Unbudgeted Request of Funds for something that is not in your budget (UNBR)
- An Unbudgeted Staff Request for additional staff not in your budget (UNSR)
- Position Change Request: All positions are on a single account (PC1\$)
- Position Change Request: The positions are on more than one account (PC2\$)

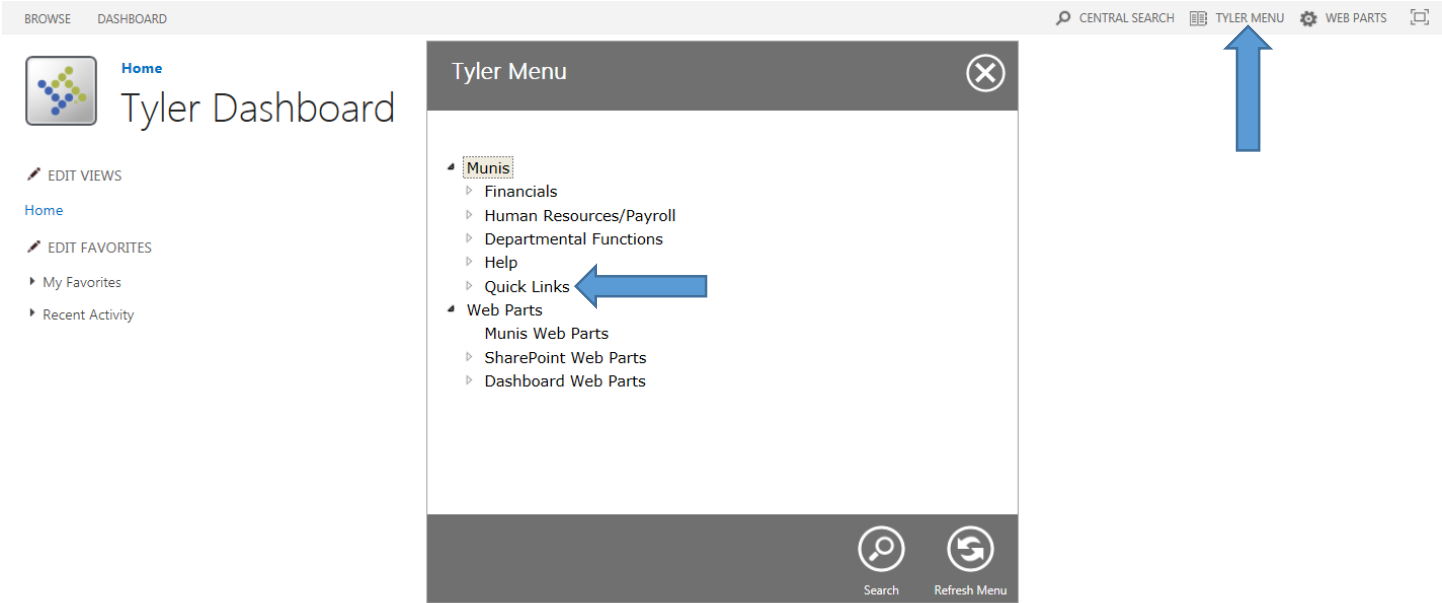
The purpose of this document is to:

1. Provide Instructions on how to install Munis PBR as a favorite on your computer.
2. Provide instructions on how to:
  - a. Enter a PBR request into Munis.
  - b. Attach the required approval to your request in Munis.
  - c. RELEASE your PBR request to move it forward in the approval process.
  - d. Check the status of your PBR request.
3. Provide examples of commonly used SCRIPTS to copy into the Request Comment section of your PBR request.

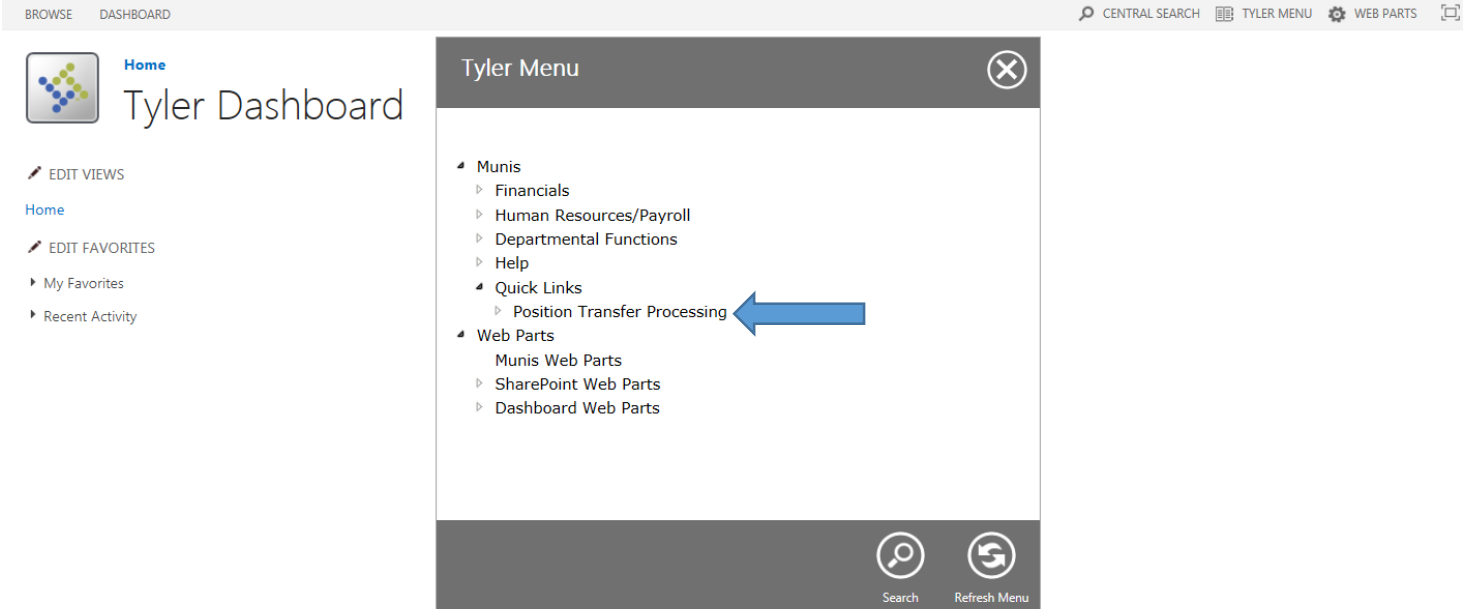
Please contact your department assigned budget liaison or Keith Robertson (for Position Change Requests) with any questions.

# Installing PBR on Your Computer

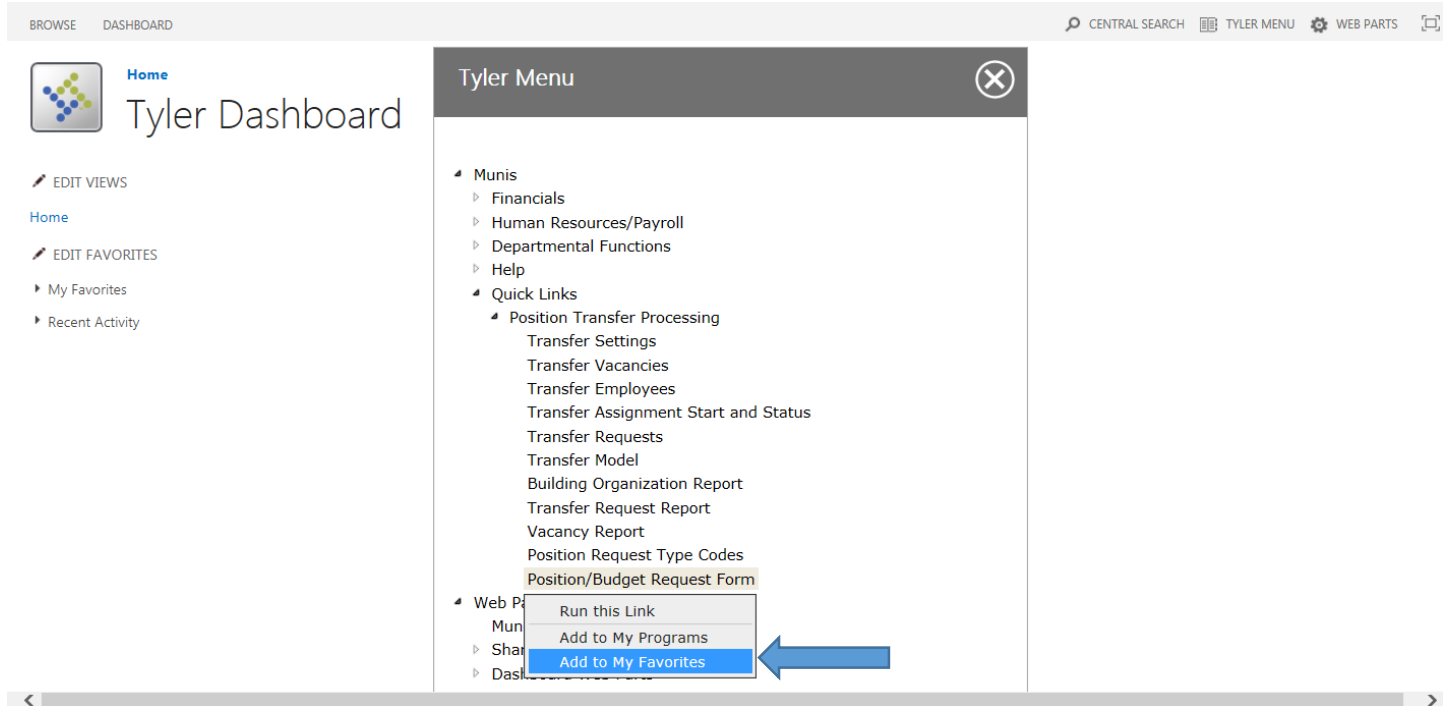
- Click on **TYLER MENU** in the top right corner of the Tyler Dashboard.
- The **Tyler Menu** will appear. Click on **Quick Links**.



- Click on **Position Transfer Processing**.



- **Position/Budget Request Form** will be listed at the bottom.
- Right click on **Position/Budget Request Form** and click **Add to My Favorites** to make it a favorite on your MUNIS Dashboard.



## How to Enter a Position/Budget Request

- You will complete two fields on this screen and add an attachment.
- Create a request by clicking on the **green plus sign** on the top row.

Position/Budget Request

**Request Number** [ +1 ]

**Request Type** [ v ]

**Request Created** [ ]

**Request Clerk** [ ]

**Department** [ ... ]

**Request Status** [ v ]

Request Comments [ ]

Approve Reject Hold Forward Approvers

Employee Identification

**Employee** [ ... ] **SSN** [ ] **Last Name** [ ] **First Name** [ ] **Middle Name** [ ] **MI** [ ]

Personnel Action

Effective Date [ ]

Action Code [ v ]

Reason/Auth [ v ]

Action Category [ ]

Action Checklist [ ]

Personnel Action [ ]

Position Change

**Position** [ ... ]

Status [ v ]

Job Class [ ]

Group/BU [ v ]

Location [ v ]

Position Type [ ]

Position Change [ ]

Personnel Workflow

Workflow Status [ v ]

Approve Reject Hold Forward Approvers

Position Change Workflow

Workflow Status [ v ]

Approve Reject Hold Forward Approvers

Budgetary Data

**Journal** [ ]

Fiscal year [ ]

Period [ ]

Budget Amendment [ ]

Budget Amendment Workflow

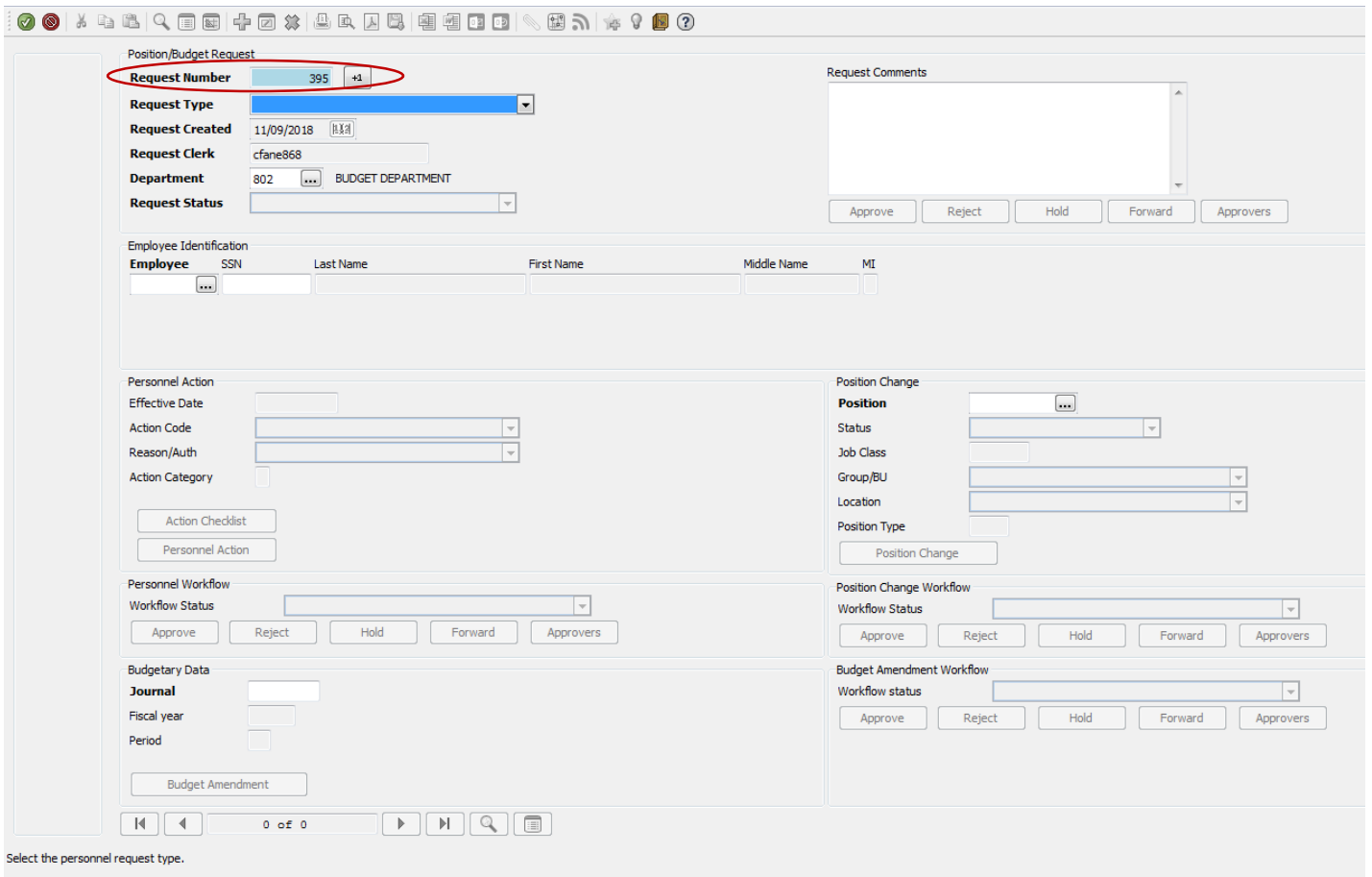
Workflow status [ v ]

Approve Reject Hold Forward Approvers

Release this position/budget request for approval.

OVR

- **Request Number:** do not enter anything, just press the TAB button. A number will automatically be assigned. Make note of this number for future references.



Position/Budget Request

**Request Number** 395 +1

**Request Type** [Dropdown]

**Request Created** 11/09/2018 [Calendar]

**Request Clerk** cfane868

**Department** 802 [Dropdown] BUDGET DEPARTMENT

**Request Status** [Dropdown]

Request Comments [Text Area]

Approve Reject Hold Forward Approvers

**Employee Identification**

Employee	SSN	Last Name	First Name	Middle Name	MI
[Dropdown]	[Text]	[Text]	[Text]	[Text]	[Text]

**Personnel Action**

Effective Date [Text]

Action Code [Dropdown]

Reason/Auth [Dropdown]

Action Category [Text]

Action Checklist [Button]

Personnel Action [Button]

**Personnel Workflow**

Workflow Status [Dropdown]

Approve Reject Hold Forward Approvers

**Budgetary Data**

**Journal** [Text]

Fiscal year [Text]

Period [Text]

Budget Amendment [Button]

**Position Change**

Position [Dropdown]

Status [Dropdown]

Job Class [Text]

Group/BU [Dropdown]

Location [Dropdown]

Position Type [Text]

Position Change [Button]

**Position Change Workflow**

Workflow Status [Dropdown]

Approve Reject Hold Forward Approvers

**Budget Amendment Workflow**

Workflow status [Dropdown]

Approve Reject Hold Forward Approvers

0 of 0

Select the personnel request type.

- **Request Type:** there are five choices listed below in the drop down menu. Refer to the first section of this document or to the PBR Types & Scripts at the end of this document.

The screenshot displays a web application interface for creating a Position/Budget Request. The interface is organized into several sections:

- Position/Budget Request:** Contains fields for Request Number (395), Request Type (dropdown menu with a blue arrow pointing to it), Request Created, Request Clerk, Department, and Request Status. A Request Comments text area and a set of action buttons (Approve, Reject, Hold, Forward, Approvers) are also present.
- Employee Identification:** Includes fields for Employee, SSN, Last Name, First Name, Middle Name, and MI.
- Personnel Action:** Features fields for Effective Date, Action Code, Reason/Auth, and Action Category, along with Action Checklist and Personnel Action buttons.
- Personnel Workflow:** Includes a Workflow Status dropdown and a set of action buttons (Approve, Reject, Hold, Forward, Approvers).
- Budgetary Data:** Includes fields for Journal, Fiscal year, and Period, with a Budget Amendment button.
- Position Change:** Features fields for Position, Status, Job Class, Group/BU, Location, and Position Type, along with a Position Change button.
- Position Change Workflow:** Includes a Workflow Status dropdown and a set of action buttons (Approve, Reject, Hold, Forward, Approvers).
- Budget Amendment Workflow:** Includes a Workflow status dropdown and a set of action buttons (Approve, Reject, Hold, Forward, Approvers).

At the bottom of the interface, there are navigation controls including a search icon and a page indicator showing 0 of 0.

Select the personnel request type.

- **Department:** this will be automatically populate by your information. Do not change this, tab through it to the Request Comments field.
- **Request Comments:** Copy and paste the appropriate script from the PBR Types & Scripts at the end of this document or type in the script, modify the information with details specific to your request.
- Click on the **green check mark** (top left) to add this record. You have created a PBR in Munis, but you still need to attach the approval document.

The screenshot shows a web application interface for creating a Position/Budget Request. The interface is divided into several sections:

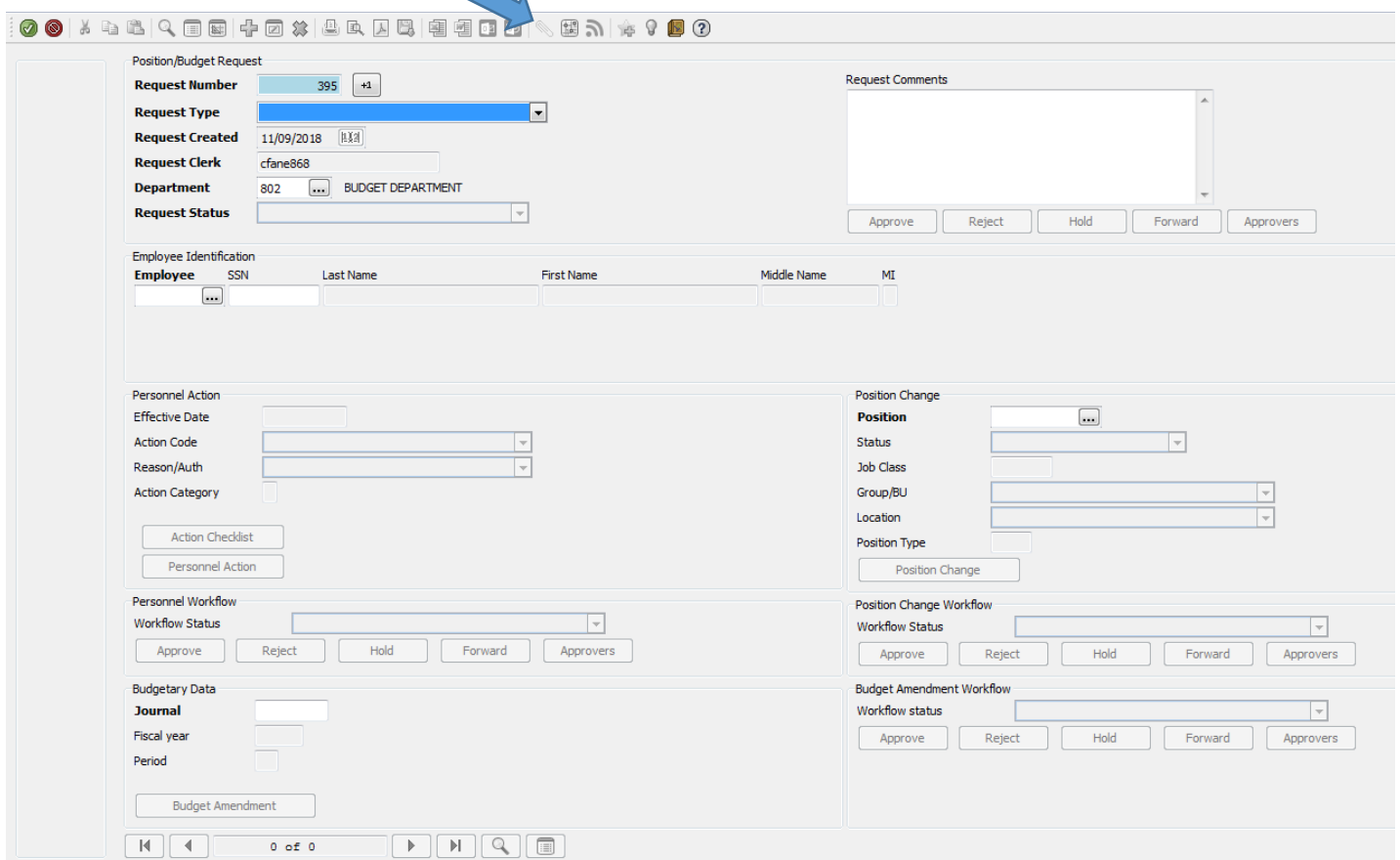
- Position/Budget Request:** This section contains fields for Request Number (395), Request Type (dropdown), Request Created (11/09/2018), Request Clerk (cfane868), Department (802 BUDGET DEPARTMENT), and Request Status (dropdown). A red circle highlights the Request Comments text area.
- Employee Identification:** This section contains fields for Employee (dropdown), SSN, Last Name, First Name, Middle Name, and MI.
- Personnel Action:** This section contains fields for Effective Date, Action Code, Reason/Auth, and Action Category. It includes buttons for Action Checklist and Personnel Action.
- Personnel Workflow:** This section contains a Workflow Status dropdown and buttons for Approve, Reject, Hold, Forward, and Approvers.
- Budgetary Data:** This section contains fields for Journal, Fiscal year, and Period. It includes a Budget Amendment button.
- Position Change:** This section contains fields for Position (dropdown), Status, Job Class, Group/BU, Location, and Position Type. It includes a Position Change button.
- Position Change Workflow:** This section contains a Workflow Status dropdown and buttons for Approve, Reject, Hold, Forward, and Approvers.
- Budget Amendment Workflow:** This section contains a Workflow status dropdown and buttons for Approve, Reject, Hold, Forward, and Approvers.

At the bottom of the interface, there is a navigation bar with a green checkmark icon, a search icon, and a list icon. Below the navigation bar, the text "Select the personnel request type." is displayed.



## How to Attach a Document to the PBR

- All PBR's should be reviewed with your Cabinet Member before entry into MUNIS.
- All PBR's must have a Cabinet Member approval attached to the request.
- Acceptable Approval Document – an email from the Cabinet Member that includes the details of the request.
- Locate the **paperclip icon** on the top row of this screen. Click on the icon and a new screen will open.

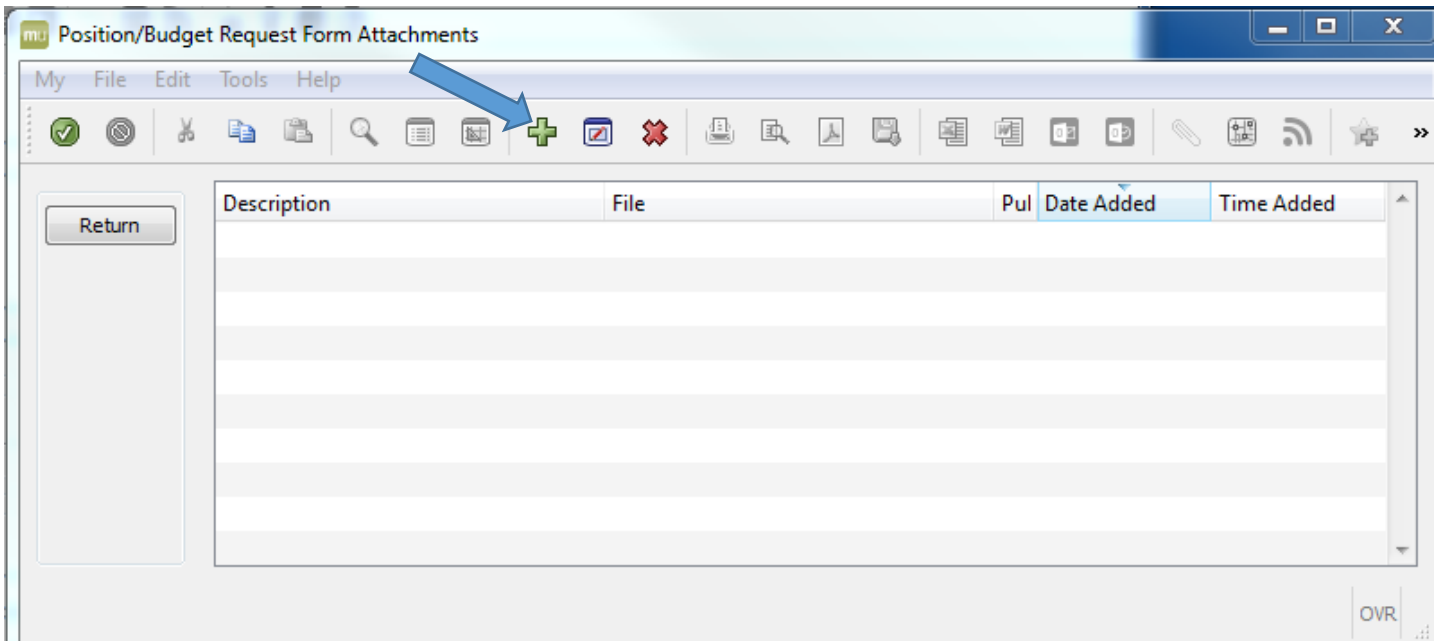


The screenshot displays the MUNIS Position/Budget Request form. A blue arrow points to the paperclip icon in the top toolbar. The form is divided into several sections:

- Position/Budget Request:** Includes fields for Request Number (395), Request Type (dropdown), Request Created (11/09/2018), Request Clerk (cfane868), Department (802 BUDGET DEPARTMENT), and Request Status (dropdown). A Request Comments text area and buttons for Approve, Reject, Hold, Forward, and Approvers are also present.
- Employee Identification:** A table with columns for Employee, SSN, Last Name, First Name, Middle Name, and MI.
- Personnel Action:** Fields for Effective Date, Action Code, Reason/Auth, and Action Category. Includes buttons for Action Checklist and Personnel Action.
- Personnel Workflow:** A Workflow Status dropdown and buttons for Approve, Reject, Hold, Forward, and Approvers.
- Budgetary Data:** Fields for Journal, Fiscal year, and Period. Includes a Budget Amendment button.
- Position Change:** Fields for Position, Status, Job Class, Group/BU, Location, and Position Type. Includes a Position Change button.
- Position Change Workflow:** A Workflow Status dropdown and buttons for Approve, Reject, Hold, Forward, and Approvers.
- Budget Amendment Workflow:** A Workflow status dropdown and buttons for Approve, Reject, Hold, Forward, and Approvers.

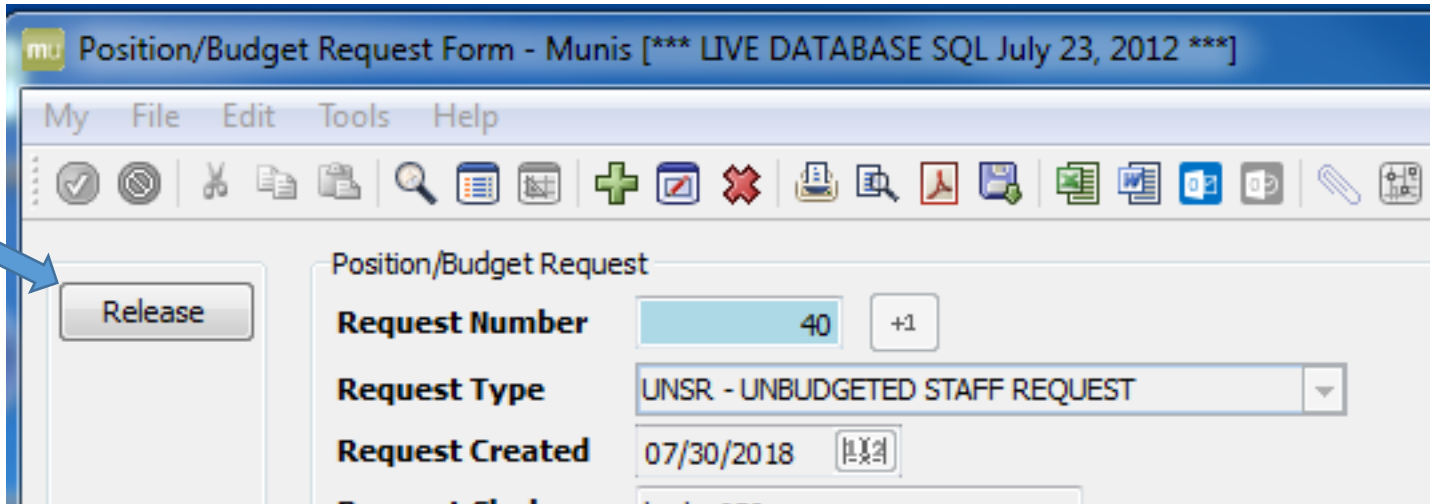
At the bottom of the form, there are navigation icons and a page indicator showing 0 of 0.

- Click on the **green plus sign** to add a document. Follow the pop-up prompts. When you are finished X out.



## RELEASING Your PBR Request for Approval

- Now that you have fully completed a PBR it is time to move it forward for action from the appropriate Budget Department staff. To move this PBR forward click on the “**Release**” button (top left) of the PBR screen. This will send the PBR to the appropriate Budget staff for action.



mu Position/Budget Request Form - Munis [\*\*\* LIVE DATABASE SQL July 23, 2012 \*\*\*]

My File Edit Tools Help

Position/Budget Request

**Request Number** 40 +1

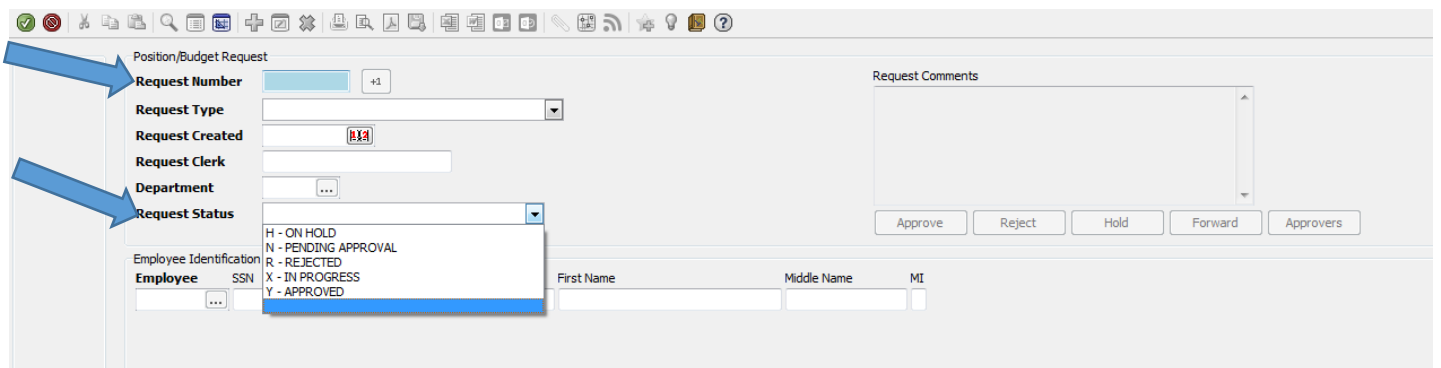
**Request Type** UNSR - UNBUDGETED STAFF REQUEST

**Request Created** 07/30/2018

- **PLEASE NOTE – Your PBR Request will not be submitted to the budget department for review and processing until you hit the RELEASE button.**

## How to Check the Status of Your PBR Request

- You can check the status of your request by reviewing the Request Status Section on the PBR screen.
- Click the **search icon**, type in your Request Number and hit the **green check mark**. The status of your request will appear in the Request Status Box.



The screenshot shows the 'Position/Budget Request' interface. On the left, there are several input fields: 'Request Number' (with a search icon and a green checkmark), 'Request Type' (dropdown), 'Request Created' (date field), 'Request Clerk' (text field), 'Department' (dropdown), and 'Request Status' (dropdown). A blue arrow points to the 'Request Number' field, and another blue arrow points to the 'Request Status' dropdown. The 'Request Status' dropdown is open, showing a list of status options: 'H - ON HOLD', 'N - PENDING APPROVAL', 'R - REJECTED', 'X - IN PROGRESS', and 'Y - APPROVED'. Below the dropdown, there are fields for 'Employee Identification' (SSN), 'Employee' (with a dropdown), 'First Name', 'Middle Name', and 'MI'. On the right side, there is a 'Request Comments' text area and a row of buttons: 'Approve', 'Reject', 'Hold', 'Forward', and 'Approvers'.

- Status Explanations:
  - **On Hold** – this request requires Superintendent approval and is currently being reviewed. All Unbudgeted Requests and Unbudgeted Staff Requests are put On Hold.
  - **Pending Approval** – the Requester is currently working on completing the request or has not hit the RELEASE button.
  - **Rejected** – your request has been denied by the Budget Department and/or Superintendent. You will receive an email notification from the budget department explaining the reasons for the denial.
  - **In Progress** – your request is currently being reviewed by the Budget Department.
  - **Approved** – your request has been Approved and the Budget Department has updated all Munis Accounts and Position Control. You will receive an email notification that your request has been Approved.

## Attachment

<b>PBR Types &amp; Scripts Table</b>			
<b>POSITION/ BUDGET REQUEST (PBR) TYPE</b>	<b>PURPOSE</b>	<b>Script to use in Request Comment section on PBR. Copy and paste the script below on the PBR form in the Request Comments field. Update the script to meet your needs.</b>	<b>Scan Request Approval</b>
BT	Submit this type of PBR to transfer money from one account to another account.	Transfer <b>\$ 2500</b> from account <b>A0004D21-500</b> to account <b>A0004D21-475</b> . Rationale: <b>John Doe will attend required trip to Albany, SED meeting June 1-2, 2017.</b>	Scan and attach approval.
UNBR	Submit this type of PBR to request money from the district account because you do not have enough. The transfer from account will be A0009V19-439.	Transfer <b>\$ 5000</b> from account <b>A0009V19-439</b> to account <b>A0004D21-500-MAG</b> . Rationale: <b>additional funds are required to purchase the materials necessary for the STEM days at School 59 Science Magnet.</b>	Scan and attach approval.
UNSR	Submit this type of PBR to request staff that is not budgeted.	Add position: <b>Grade 1 Teacher - 2250, FTE 1.0 @ School 079</b> . Rationale: <b>1st grade classes are at 33, 34, and 34. The new class will eliminate the overages.</b>	Scan and attach approval.
PC1\$	Submit this type of PBR to make a change to a position. All positions must be on the same account. Such as changing one position into two positions.	<b>CHANGE:</b> Position 3062, (General Mechanic-8145, FTE 1.00, account A0003J16-180) @ 909, into a <b>NEW Position (Locksmith-8245, FTE 1.00, account A0003J16-180) @ 909</b> Rationale: <b>the current general mechanic is retiring 7/27/18 and the district is in need of a locksmith.</b>	Scan and attach approval.
PC1\$	Submit this type of PBR to make a change to a position. All positions must be on the same account. Such as changing one position into two positions.	<b>CHANGE:</b> Position 1234, (Art Teacher - 2080, FTE 1.00, account A7205N21-136) @ 045, into two positions. <b>ADD</b> position (Art Teacher - 2080, FTE 0.40, account A7205N21-136) @ 45. <b>ADD</b> the second position (Art Teacher - 2080, FTE 0.60, account A7205N21-136) @ 45. Rationale: <b>there will be two itinerant teachers at this school.</b>	Scan and attach approval.
PC1\$	Submit this type of PBR to make a change to a position. All positions must be on the same account. Such as changing the location of the position.	<b>CHANGE LOCATION</b> for Position 999, (12:1:1 Teacher - 2453, FTE 1.00, account A0006E22-141) @ 735 to school 099. Rationale: <b>new classroom is opening.</b>	Scan and attach approval.

PC2\$	Submit this type of PBR to make a change to a position. However, the positions are not on one account but are on 2 or more accounts.	<b>REDUCE</b> Position 5678, (Grade 1 Teacher - 2250, FTE 1.00, account A7115C21-120) @ 003. <b>ADD</b> position (Grade 4 Teacher - 2265, FTE 1.0, account A7115C21-121) @ 003. Rationale: 1st grade class size is extremely small and can consolidate one 1st grade class. 4th grade is over enrolled and additional class will prevent class overages.	Scan and attach approval.
-------	--	--	---------------------------