Chapter 20

**POSITION CONTROL RULE TABLES**

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Introduction

Use the Position Control module to define the position classifications for your site and apply them to your budget. It supports the full range of functions necessary for position administration, including budget preparation and monitoring, position control and staffing, position classification, and account distribution.

The values you define to the Position Control tables using the rule forms documented in this chapter determine position processing. Use the information in this chapter in conjunction with the material in Chapter 19, *Budget and Position Control*.

Menu Navigation Table

If you know the seven-letter name of the form you want to access, you may use Direct Access to bypass the intervening menus. To use Direct Access at any menu, enter the seven-letter name of the form you want at the Direct Access prompt. Instructions for accessing menus are in Chapter 2, *Using Banner*, in this manual.

Access this menu from the Budget and Position Control System Menu (*FINBUDG*).

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>NTRPCLS</td>
<td>Position Class Rule Form. Enables you to create an employee position class and associate it with salary guidelines, employee class, and employee skill level.</td>
</tr>
<tr>
<td>NTRSALA</td>
<td>Salary/Rate Structure Rule Form. Enables you to define rules for salaries or hourly rates.</td>
</tr>
<tr>
<td>NTRSGRP</td>
<td>Salary Group Rule Form. Enables you to define active and inactive salary groups for each table.</td>
</tr>
<tr>
<td>NTRFRNG</td>
<td>Payroll Fringe Rule Form. Enables you to establish budget benefits and deductions by employee class.</td>
</tr>
<tr>
<td>NTRBROL</td>
<td>Budget Roll Process Parameter Rule Form. Enables you to establish parameters for rolling the current budget into the new fiscal year.</td>
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<tr>
<td>NTRJINC</td>
<td>Mass Job Salary Increase Rule Form. Enables you to establish the parameters used in the Mass Salary Update Process (NBPMASS) to implement step increases and salary increases.</td>
</tr>
<tr>
<td>NTRSTRL</td>
<td>Mass Salary Table Roll Rule Form. Enables you to establish the parameters used in the Mass Salary Update Process (NBPMASS) to roll data from one salary group to another.</td>
</tr>
<tr>
<td>NTRWKSH</td>
<td>Work Schedule Rule Form. Enables you to enter work scheduling information for employees.</td>
</tr>
</tbody>
</table>
Position Control Rule Forms

This section provides you with examples and descriptions for each form within the Position Control Rule Forms feature of the Budget and Position Control module.
The forms in this section flow in the order that they appear on the Position Control Rule Forms Menu (*FINPRULE).

Each form contains a description, instructions on how to use the form, essential field information, and a navigational guide.

For more detailed information on how to use these forms, refer to Chapter 3, *Processing*.

**Position Class Rule Form (NTRPCLS)**

Use the Position Class Rule Form to create a position class and associate it with salary guidelines, employee class, and employee skill level. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

The salary guidelines you define on this form are the default values for the Position Form (NBAPOSN) and the Employee Job Form (NBAJOBS). Refer to Chapter 19, *Budget and Position Control* for more information on NBAPOSN and NBAJOBS.

When you enter or change information in any fields in the data section of the main window, the system displays the Compensation/Classification Change Date Window.

This window is displayed immediately after you use the Save function. The date displayed indicates when the change is to go into effect. The default value is the current date. You can, however, override this date. The date you enter must be less than or equal to the current date.

To exit the Compensation/Classification Change Date window, click on or tab to the **OK** button. All new or changed data is saved in the record.

**California Pension Information Window (For NTRPCLS)**

The California Pension Information window is related to California STRS/PERS processing.

**Salary/Rate Structure Rule Form (NTRSALA)**

Use the Salary/Rate Structure Rule Form to define rules for salaries or hourly rates. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

A salary/rate rule defines a salary table and includes salary grade and ranges, hourly or salaried status, and rate or salary steps with their associated amounts. The values you define on NTRSALA are the default values for the Position Class Rule Form (NTRPCLS).
Salary Group Rule Form (NTRSGRP)

Use the Salary Group Rule Form to define active and inactive salary groups for each table. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

This form is query-only.

Fringe Budgeting Rule Form (NTRFRNG)

Use the Fringe Budgeting Rule Form to establish budget benefits and deductions by employee class. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

You may define budget parameters either as amounts or percentages.

Budget Roll Process Parameter Rule Form (NTRBROL)

Use the Budget Roll Process Parameter Rule Form to establish parameters for rolling the current budget into the new fiscal year. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

Enter a value in the Fiscal Year field; you may click the Fiscal Year search button or request a List. This takes you to the Fiscal Year Form (NBAFISC). Select Next Block.

Enter a value in the Employee Class Code field. You may click the Employee Class Code search button or request a List. This takes you to the Employee Class Query Form (PTQECLS).

Mass Job Salary Increase Rule Form (NTRJINC)

Use the Mass Job Salary Increase Rule Form to establish the parameters used in the Mass Salary Update Process (NBPMASS) to implement step increases and salary increases. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

Enter a fiscal year code. To select an existing code, click Roll Using Salary Group or request a List. This takes you to the Salary Group Rule Form (NTRSGRP). Select Next Block.

The Mass Job information displays. Select Next Block to access each successive information block. You may add or change the information for all fields except Activity Date.

For additional information on the NBPMASS process, refer to Chapter 29, Reports and Processes.
Mass Salary Table Roll Rule Form (NTRSTRL)

Use the Mass Salary Table Roll Rule Form to establish the parameters used in the Mass Salary Update Process (NBPMASS) to roll data from one salary group to another. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

For additional information on NBPMASS, refer to Chapter 29, Reports and Processes.

Work Schedule Rule Form (NTRWKSH)

Use the Work Schedule Rule Form to enter work scheduling information for employees. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

Use the Work Schedule Rule Form to assign a Work Schedule Code that defines the days, shifts, and number of hours an employee should work. This data must comply with the Fair Labor Standards Act.

Contract Dates Roll Parameter Rule Form (NTRCROL)

Use the Contract Dates Roll Parameter Rule Form to establish date ranges for use in rolling contract dates via the NBPMASS Roll Contract (D) Dates option. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

Use NTRCROL to enter the different combinations of from and to Contract Begin and End dates.

If you use the Roll Contract (D) Dates option, you must establish parameters on this form before running the Mass Salary Table Update Process (NBPMASS).

Fringe Charge Back Rule Form (NTRFBLD)

Use the Fringe Charge Back Rule Form to define rules for calculating fringe budgets, encumbrances, and fringe expenses. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

Use the horizontal scroll bar or select Next Item to access the Actv and Locn fields.

The functionality for this form is important when you choose to “charge” accounts based on a percentage versus the actual amount. NTRFBLD allows for the definition of installation fringe rates and external funding source fringe rates.

The Fringe Charge Back Rule Form also contains the overriding labor distributions used for posting fringe amounts based on earnings defined when fringe indicators on the Earnings Code Rule Form (PTREARN) are initiated.
External Funding Source Fringe Rate Definition Window

The External Funding Source Fringe Rate Definition Window enables you to specify effective-date external funding source fringe rates.

Use the horizontal scroll bar or select Next Item to access the Actv and Locn fields.

Select Effective Date to Query Window

The Select Effective Date to Query Window appears when you select the View function from the External Funding Source Fringe Rate Definition Window. (Note that it does not appear when you select the View function from the main window). If you select a date from this window, the system returns to the main window and displays the labor distribution data of the date you selected.

To view existing future changes without selecting a date, select the Cancel function.

External Fringe Labor Distribution Override Window

The External Fringe Labor Distribution Override Window enables you to perform effective-date external funding labor distribution overrides.

Use the horizontal scroll bar or select Next Item to access the Locn field.

Create New Date Record Window

The Create New Date Record window collects the effective date of future-change transactions.

- If you access it from the root window, the date you enter becomes the effective date of your labor distribution override.
- If you access it from the External Funding Source Fringe Rate Definition window, the date you enter becomes the effective date of your new external funding source fringe rates for this FOAPAL.
- If you access it from the External Fringe Labor Distribution Override window, the date you enter becomes the effective date of your overriding external fringe labor distribution.

Enter the New Effective Date, and click OK or select Save. This commits this date to your system and establishes a future change.

Use the DD-MON-YEAR format.

Confirmation of Delete Window

The confirmation of delete window enables you to confirm or cancel the deletion of a record.
Encumbrance Hours Roll Parameter Rule Form (NTRHROL)

The Encumbrance Hours Roll Parameter Form establishes the roll indicator and effective date for use in rolling encumbrance hours via the NBPM MASS Roll (E) Encumbrance Hours option. Establish parameters by employee class. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

If you use the Roll (E) Encumbrance Hours option, you must establish parameters on this form before running the Mass Salary Table Update Process (NBPMASS).

Click the Employee Class search button or request a List. This takes you to the Employee Class Query Form (PTQECLS).

Employee Class Rule Form (FTMECLS)

Use the Employee Class Rule Form to create employee classes and associate them with an earnings code, contract information, and a budget. Access this form from the Position Control Rule Forms Menu (*FINPRULE).

Note: This form displays if your site does not have the Banner Human Resources system installed.

The system uses the value for this code on the Position Definition Form (NBAPOSN) when you create a position referencing an employee class defined here.

Work schedule and description fields enable you to define a full schedule that an employee will work including days, shifts, and number of hours on a given shift. Define work schedules to the system using the Work Schedule Code Validation Form (NTVWKSH).

The system does not require a work schedule code to complete a transaction.

Position Control Validation Forms

This chapter provides you with examples and descriptions for each form within the Position Control Validation Forms feature of the Budget and Position Control module.

Forms in this segment flow in the order that they appear on the Position Control Validation Forms Menu (*FPCVALD).

Each form contains a description, instructions on how to use the form, essential field information, and a navigational guide.

For more detailed information on how to use these forms, refer to Chapter 3, Processing.
Dictionary of Occupational Titles Code Validation Form (NTVDOTT)


The Position Definition Form (NBAPOSN) uses the values entered on NTVDOTT to validate Dictionary of Occupational Titles Code entries.

Federal Occupational Code Validation Form (NTVPFOC)

Use the Federal Occupational Code Validation Form to identify and maintain Federal Occupational Code records. Access this form from the Position Control Validation Forms Menu (*FPCVALID).

The Position Definition Form (NBAPOSN) uses the values that you enter on this form to validate Federal Occupational Code entries.

National Occupational Class Code Validation Form (NTVPNOC)

Use the National Occupational Class Code Validation Form to identify and maintain National Occupational Code records. Access this form from the Position Control Validation Forms Menu (*FPCVALID).

The Position Definition Form (NBAPOSN) uses the values entered on this form to validate National Occupational Code entries.

Work Schedule Code Validation Form (NTVWKSH)

Use the Work Schedule Code Validation Form to define work schedule codes for use on the Position Definition Form (NBAPOSN), the Employee Class Rule Form (PTRECLS), the Employee Job Form (NBAJOBS), and the Employee Class Rule Form (FTMECLS). Access this form from the Position Control Validation Forms Menu (*FPCVALID).

The codes you define on this form are originally entered on the Work Schedule Rule Form (NTRWKSH).

List of Position Control Reports and Processes

The following reports and processes contain information you maintain in the Position Control module.

Refer to Chapter 29, Reports and Processes for descriptions, parameter listings, and sample output. Position Control uses the following Budget Development reports and processes:
Approved Distributed Budget Report (FBRAPPD)

Approved Budget Report (FBRAPPR)

Budget Build Process (FBRBDBB)

Distribution Process Summary (FBRBDDS)

Budget Roll to General Ledger Process (FBRBDRL)

Finance Budget Feed Process (FBRFEED)

Budget Mass Change Process (FBRMCHG)

Budget Worksheet Report (FBRWKSH)