Non-Position (Non-Personnel) Budgeting

The Non-Position Budget Layout is used to develop the new year budget amounts for non-personnel revenue and expenses at the Fund (Cost Object) and Commitment Item (G/L Account) level.

Accessing the Non-Position Layout and Loading Data

Note: Refer to the Budget Tool: General Navigation Guide for detailed steps on allowing pop-ups for cbp.duke.edu and accessing the Non-Position layouts, navigating, and loading data. Summarized steps are included in this guide.

1. Log onto work.duke.edu. (Do NOT type in http://www.)
2. Enter your NetID and password. Multifactor authentication is required.

On the Duke@WORK web portal screen:

3. Select the Budget tab.

4. Select the Budget Development Link.
5. On the Budget Development page, click on **Non-Position**.

6. Click on the underlined name link for the desired option to select and load the Non-Position Data.
   
   - **Non-Position by Package** = to select by a package number if you know your package number and it’s efficient to work by package. This is the recommended way to work in the Budget tool and the method used for examples in this guide.
   
   - **Non-Position by BFR** = to select and load your budget data by BFR Code. For details on how load data by BFR, see the *Budget Tool: General Navigation Guide*.
   
   - **Non-Position Upload** = to upload budget data from a spreadsheet template. Detailed instructions provided in the Non-Position Upload section.
7. Enter the Package number in the **Budget Package** field.

8. Click on the **Set Package** button.

   *Note:* For larger Packages, it may be helpful to filter the Package by BFR. For detailed information on how to filter a Package by BFR, see the **Budget Tool: General Navigation Guide**.

9. Click **Load Data**.

10. Review the loaded data and refer to the next sections of the guide for details on entering budget data on the Non-Position layout.

   *Note:* When loading data, the view may open at a line item toward the bottom, so simply scroll to the top of the data. Remember to maximize the screen for better viewing as well.