Position (Personnel) Budgeting

The Position Budget Layout is used to develop the new year budget amounts for personnel by position for Exempt (salaried), Non-exempt (hourly rate), and student employees. The layout contains different views for Funding (all positions funded by the organization selected), Owned (positions owned by the organization selected), and Student (at the Fund /Commitment Item level).

Accessing the Position Layout and Loading Data

Note: Refer to the Budget Tool: General Navigation Guide for detailed steps on accessing the Position layout, 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 Map*, click on **Position**.

6. Click on the underlined name link for the desired option to select and load the Position Data:

   - **Position by Package** = to select by a package number if you know your package number and it’s efficient to work by package.
   - **Position by BFR** = to select and load your budget data by BFR Code.
   - **Position Funded Upload** = to upload Position budget data for positions funded in all or part by your organization and covered in a later section of this Guide.
   - **Position Owned Upload** = to upload Position budget data for positions owned by your organization and covered in a later section of this Guide.

**Note:** Refer to the *Budget Tool: General Navigation Guide* for detailed steps on selecting by Package or by BFR. Next steps are summarized for selecting by Package.
7. Enter the appropriate package in the **Budget Package** field or use the drop down to find the package. If the drop down is used, the package will be immediately set.

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

9. Back on the Layout screen, review the Package displayed and click on **LOAD DATA**.

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