

# Workforce Actions Instructions

## Purpose

To provide an instrument to survey state agencies concerning Workforce actions necessary to operate within constrained agency and program appropriations during FY 2008-09, FY 2009-10, and FY 2010-11.

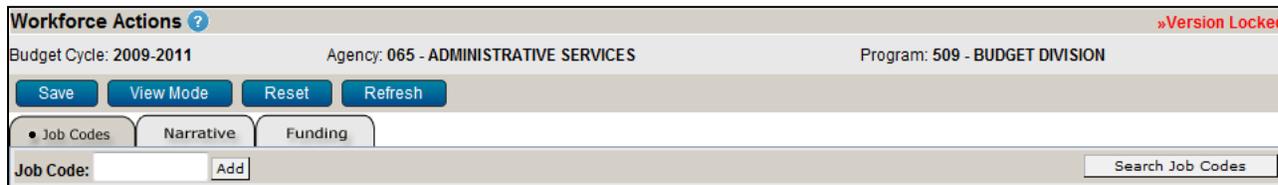
## Getting Started

In the left-margin menu, click **“Workforce Actions”**. The **Workforce Actions** screen will be loaded.

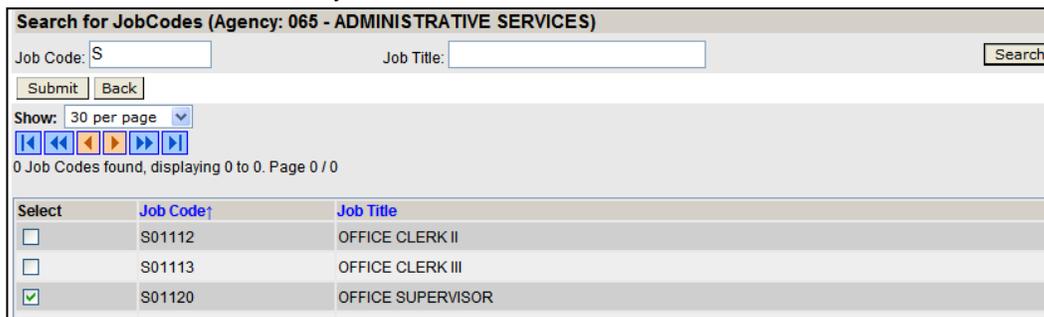
- **Budget Cycle** defaults to the current cycle.
- Select **Agency** and **Program** from the options that have been assigned to you (see Time-Saver Tip on the right margin).

### Adding a Job Code to Survey

1. Click on **Job Codes** tab and then click .

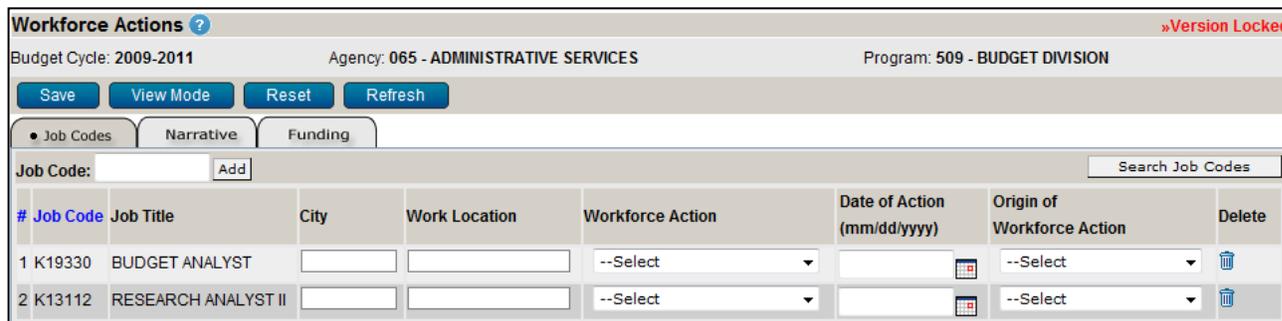


2. To add **Job Codes**, either enter a known Job Code and click the  button; or click the  button to search by Job Code or Job Title.



- On the search screen, the **Job Code** field will search for codes that begin with what is entered while the **Job Title** field will search for the characters entered anywhere in the Title. Click on **Search**.
- You may select multiple Job Codes from the search results.
- Click **Submit** to return to the previous screen with the selected Job Code(s).
- Click **Reset** to clear the criteria entered.
- Click **Back** to return to the previous screen without returning a Job Code.
- Once Job Codes have been added, the screen will look similar to this.

3. Click  to commit data entered to the database.



#	Job Code	Job Title	City	Work Location	Workforce Action	Date of Action (mm/dd/yyyy)	Origin of Workforce Action	Delete
1	K19330	BUDGET ANALYST			--Select		--Select	
2	K13112	RESEARCH ANALYST II			--Select		--Select	

### Start-Up TIP

If any of the drop-down menus fails to show expected choices, you may need to have your **Security** settings adjusted.

Contact your agency administrator or the State Budget Division for assistance.

### Time-Saver TIP

Set default options to avoid repetitive selections of **Agency** and **Version**.

Go to **User Options** in the upper right corner of any screen. Once your selections are made, press .

# Workforce Actions Instructions

## Entering Details on Job Code

For each **Job Code** that appears on the **Job Code** tab, the following information must be provided before the information can be saved:

- **City:** Designation for affected positions associated with selected Job Code.
- **Work Location:** An *optional* field that can be used to further define where the affected positions are located.
- **Workforce Action:** Select from the options in the dropdown list.
  - If **Other-See Narrative** is chosen from the drop down menu then an explanation is required to be provided on the **Narrative** tab.
- **Date of Action:** The date that action was implemented or is planned to be implemented.
- **Origin of Workforce Action:** Select one of the options from the dropdown list.
  - If **Other-See Narrative** is chosen from the drop down menu then an explanation is required to be provided on the **Narrative** tab.

The screenshot shows the 'Workforce Actions' interface. At the top, it displays 'Budget Cycle: 2009-2011', 'Agency: 065 - ADMINISTRATIVE SERVICES', and 'Program: 509 - BUDGET DIVISION'. There are buttons for 'Save', 'View Mode', 'Reset', and 'Refresh'. Below these are tabs for 'Job Codes', 'Narrative', and 'Funding'. A 'Job Code:' field with an 'Add' button and a 'Search Job Codes' field are present. The main table has the following columns: '# Job Code', 'Job Title', 'City', 'Work Location', 'Workforce Action', 'Date of Action (mm/dd/yyyy)', 'Origin of Workforce Action', and 'Delete'. Two rows are visible: 1 K19330 BUDGET ANALYST and 2 K13112 RESEARCH ANALYST II. Each row has input fields for City and Work Location, a dropdown for Workforce Action, a date picker for Date of Action, and a dropdown for Origin of Workforce Action. A 'Delete' icon is in the final column of each row.

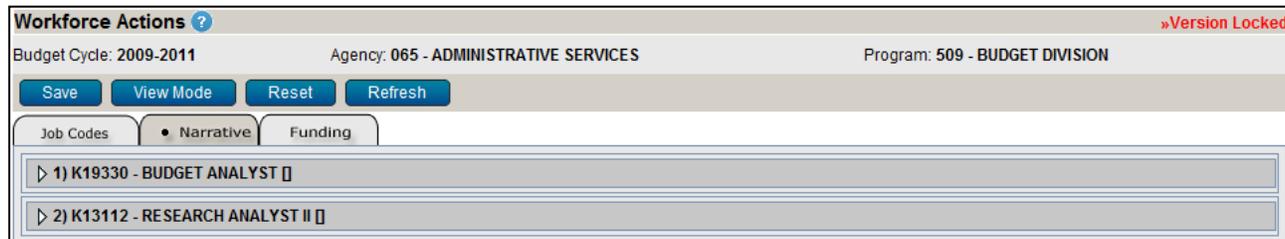
1. Enter **City**
2. Enter **Work Location** (NOTE: This is an *optional* field.)
3. Select **Workforce Action** from dropdown list
4. Enter **Date of Action**
5. Select **Origin of Workforce Action**
6. Once all required fields have been entered, click  to commit data entered to the database.  
The system will not allow you to save if you have not entered all required fields.

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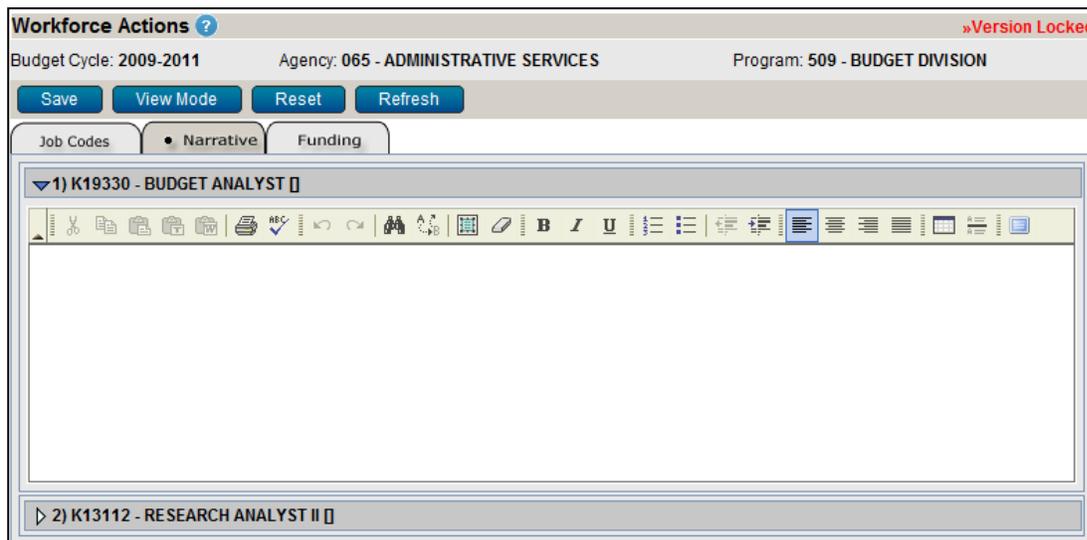
## Entering Narrative for a Job Code

Narrative should be used to provide information about the actions being taken for a specific **Job Code**. Narrative is mandatory for **Job Codes** that has **Other-See Narrative** selected on for *Workforce Action* or *Origin of Workforce Action*.

1. Click **Narrative** tab. The screen will change to look similar to this.



2. Click on white triangle next to the **Job Code** to expand the Narrative box.



- Use the edit window **button bar** for standard word processing features. If any of the buttons look unfamiliar, point your mouse over the icon for a description of that feature. The  (i.e., **Maximize the Editor Size**) button simply toggles you back and forth from full-screen editor mode to the normal screen.



- **Copy & Paste** text into the edit windows using either Ctrl-C and Ctrl-V features, or by using the   buttons on the left side of the edit window's button bar. To provide consistent formatting, a standard font style and size will be applied upon clicking .

2. Click  to commit the narrative entered to the database.

### Formatting TIP

Avoid the use of *hard returns* when entering narrative text. Using hard returns prevents normal text "wrap" and hinders publication.

# Workforce Actions Instructions

## Enter Funding a Job Code

The **Funding** tab is used to identify the savings and FTE reductions associated with each workforce action reported in the survey.

Selection of the funding information block associated with each Job Code is accomplished by clicking on the triangle to the left of the Job Code. The **Savings by Fund Type** and **FTE Reduced** should be reported as **POSITIVE NUMBERS**. A column to report savings in the operating budget is included on the form for those instances where a reduction in FTE has a direct impact on the operating budget of the program. When calculating savings associated with a reduction in FTE do not include adjustments for one-time or short term expenses such as leave payoff amounts.

1. Click **Funding** tab. The screen will change to look similar to this.

2. Click on white triangle next to the **Job Code** to expand the **Funding** box.

Fund Type	FY09 Salary/Benefits Savings	FY09 Operations Savings	FY10 Salary/Benefits Savings	FY10 Operations Savings	FY11 Salary/Benefits Savings	FY11 Operations Savings
General Fund						
Cash Fund						
Federal Fund						
Revolving Fund						
Other Fund						
<b>Total Funding</b>	\$0	\$0	\$0	\$0	\$0	\$0
<b>FTE Reduced</b>						

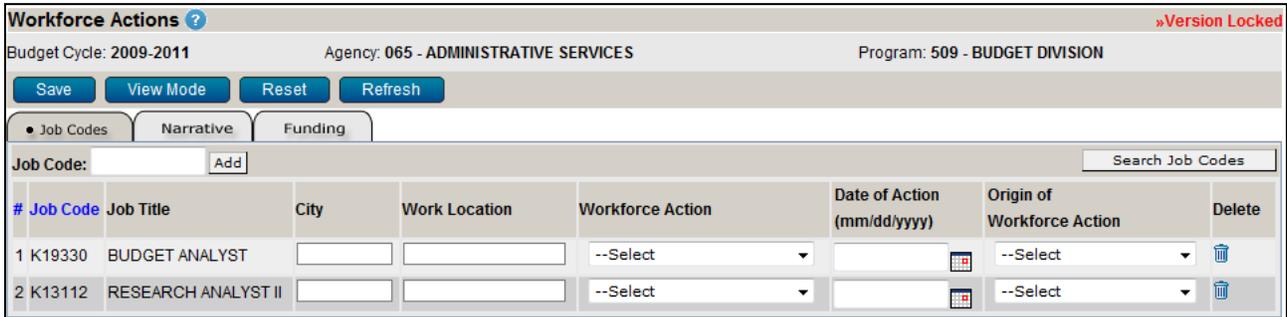
3. Enter data into correct columns.
  - The **Savings by Fund Type** and **FTE Reduced** must be entered as **POSITIVE NUMBERS**.
  - The **Operations Savings** columns are used to report savings in the operating budget for those instances where a reduction in FTE has a direct impact on the operating budget of the program.
  - When calculating savings associated with a reduction in FTE do not include adjustments for one-time or short term expenses such as leave payoff amounts.
4. Click **Save** to commit the funding entered to the database

# Workforce Actions Instructions

## Deleting a Job Code from a survey

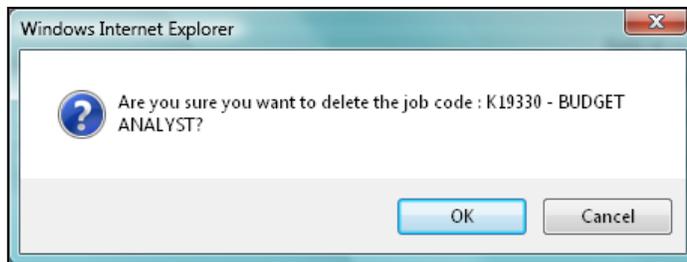
The following steps will delete a **Job Code** from the survey

1. Click on **Job Codes** tab and then click .



The screenshot shows the 'Workforce Actions' interface. At the top, it displays 'Budget Cycle: 2009-2011', 'Agency: 065 - ADMINISTRATIVE SERVICES', and 'Program: 509 - BUDGET DIVISION'. There are buttons for 'Save', 'View Mode', 'Reset', and 'Refresh'. Below these are tabs for 'Job Codes', 'Narrative', and 'Funding'. The 'Job Codes' tab is active, showing a table with columns: '# Job Code', 'Job Title', 'City', 'Work Location', 'Workforce Action', 'Date of Action (mm/dd/yyyy)', 'Origin of Workforce Action', and 'Delete'. Two rows are visible: 1 K19330 BUDGET ANALYST and 2 K13112 RESEARCH ANALYST II. Each row has a trash can icon in the 'Delete' column.

2. Click on  (Trash can).



3. Click on OK.
  - NOTE: Clicking OK will delete the **Job Code**, **Narrative** and **Funding** from the survey immediately. The information may not be recovered.