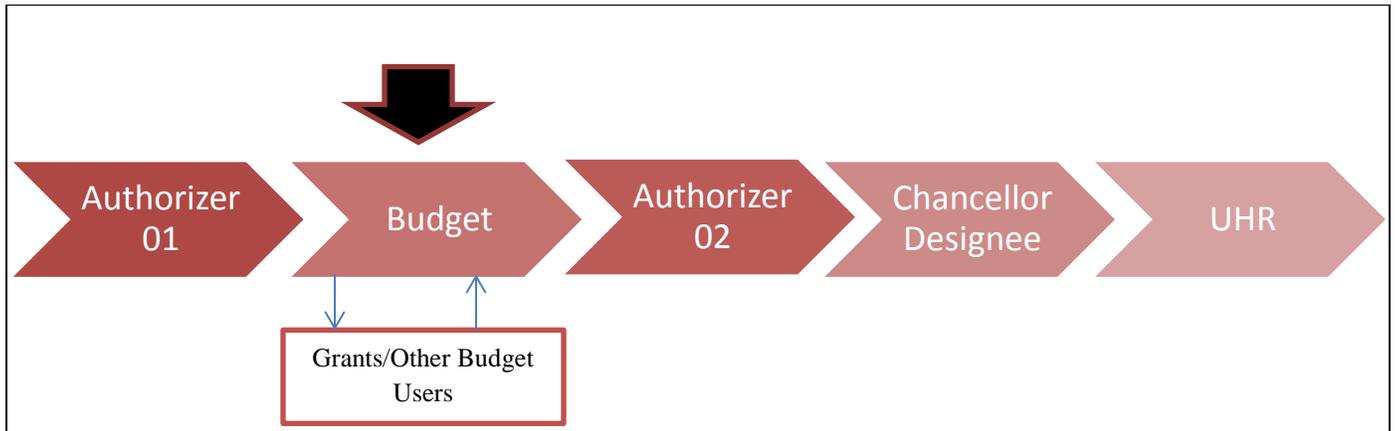


Transferring a RBHS Request in ROCS

Budget – Transferring the request amongst the same role



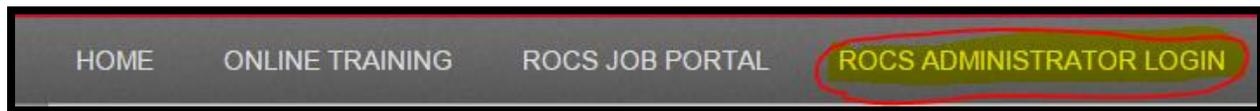
Step One:

The ‘**Budget**’ user will receive an e-mail informing them that they currently have a pending request in ROCS.

Once this e-mail is received the Budget user will login to ROCS using the following link:

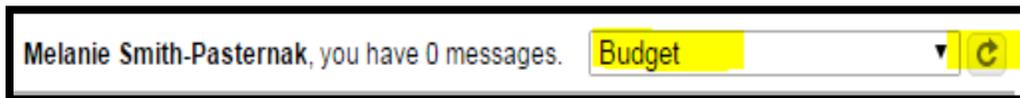
<http://rocs.rutgers.edu/>

Select ‘ROCS Administrator Login’ to login to ROCS:



Step Two:

Set your access to the “**Budget**” role using the drop-down field found in the top right area of the screen:

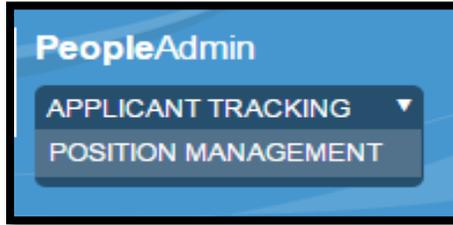


Make sure to click the “refresh arrow” in the grey box to the right of ‘**Budget**’. You will receive a success green status bar at the top of the screen once you are in the ‘**Budget**’ role.



Step Three:

Navigate to the “Position Management” module of ROCS by clicking on the drop-down in the top right area of the screen. Select “Position Management” to access that module.



Once in the “Position Management” module the top banner of the system will be orange and you will have the “Position Management” options.



Step Four:

To review a position description request toggle over “Position Descriptions” and click the “Staff Position Request” option.



Step Five:

Locate the request you want to approve, and click on the action’s name to access the record. The column labeled status will show you items in the budget state:



Position Request Name	Department	Position Request Number	Last Updated	Status
New Position Description: Program Administrator I	SPH-Biostatistics	15ST3140PR	October 19, 2015 at 03:35 PM	Budget

Step Six:

Locate the ‘Position Budget Information’ section – you can review the data. Or you may make any changes by clicking on the ‘Edit’ link:

Position Budget Information	
Account Name	SPH Account Currently: blank
Account/Index Number	131313 Currently: blank
Funding Information	State Funded Currently: blank
Fund Number	101010 Currently: blank
Percentage Funded	100 Currently: blank
Maximum Amount	

Hire Budget Information	
Type of Hire	
Name/Salary of Previous Incumbent	

Banner Position Number	
Banner Position Number	131313 Currently: blank
Banner Position Number Active	Yes Currently: blank

Step Seven:

After reviewing the request, or making edits to the request use the orange button labeled ‘Take Action on Position Request’ to move the record to the ‘**Keep working on this Position Request**’ this option will allow you to transfer the request to another user in the same role:



A window will now popup on the screen; here you can complete three items: Check the box that says ‘Transfer this Position Request to’, select the individual who you want the request to go to using the drop down menu, leave any necessary comments for the next approver, and click the box that says ‘Add this position request to your watch list?’.

Click the 'Submit' button to send the request to the user identified – please make sure the correct user is showing up in the drop-down menu (**Please note when transferring a requests laterally it will not generate an automated system e-mail. Please e-mail the person you selected to alert them that they now have a ROCS request in their queue**):

The screenshot shows a 'Take Action' dialog box with a close button (X) in the top right corner. The main heading is 'Keep working on this Position Request'. Below this, there is a checked checkbox labeled 'Transfer this Position Request to' followed by a dropdown menu showing 'Tanysha Taylor'. Underneath the dropdown is a text input field labeled 'Comments (optional)'. At the bottom of the dialog, there is an unchecked checkbox labeled 'Add this position request to your watch list?'. Two buttons, 'Submit' and 'Cancel', are located at the bottom right of the dialog.

You will receive a green success message at the top of the screen:

i Position Request was successfully transitioned