



The University of Illinois

HR/Pay Team Transferring a Position From One Organization to Another

Overview

A Position cannot be transferred from one organization to another when the Position Salary Budgets block of the Position Budget form (NBAPBUD) reflects a \$0 Budgeted Salary, an Expended Salary greater than zero (<\$0), and a negative Remaining Salary amount. Please see Figure 1 for an example of this situation.

If you try to transfer a Position that is in this situation, you will get an error that says, “Orgn Transfer Cannot Be Done When Expended Amount > Budget Amount.”

To initiate an organization transfer, the Budgeted Salary amount must be adjusted (increased or decreased) manually so that the Remaining Salary amount is \$0 or a positive value in order for an Organization Transfer to work.

The screenshot shows the Oracle Developer Forms Runtime - Web interface. The main form is titled "Position Budget NBAPBUD 6.1 (BANUSER) (NONE)". It contains fields for Fiscal Year (2004), Employee Class (BA Acad/Pro 12mth Ben Elig), Position No. (U70079), and Position Title (SPEC IT). Below these are fields for Status (Active), Type (Single), and COA (9). A sub-form titled "Position Salary Budgets NBAPBUD 6.1 (BANUSER) (NONE)" is open, showing details for Fiscal Year (2004), Orgn (662000), Date Created (01-JUL-2003), Status (Approved), Budget ID (H2004), Salary Group, Base Units (12), Phase (HLAB04), and Create FTE/Salary Records (checked). A calculation table is displayed:

Position Budget Basis	Position Annual Basis	Budget Appointment %	Budget FTE
12	12	100	1

	Budgeted	Encumbered	Expended	Remaining
Salary:	.00	13,518.75	11,587.50	-25,106.25

The error message at the bottom of the form reads: "*ERROR* Orgn Transfer Cannot Be Done When Expended Amount > Budget Amount."

Figure 1: Salary Values and Error Message on NBAPBUD



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Manually Adjusting Budgeted Salary

In order to complete an Organization Transfer of a Position, you must manually fix the Budgeted Salary amount using the following steps:

1. In Banner, go to the Position Budget form (NBAPBUD), and Next Block (using the icon or CTRL + PAGE DOWN keys) to the Position Salary Budgets block.
2. In the Budgeted Salary field, enter the positive or negative amount that balances out the value in the Remaining Salary field. For example, if the Remaining Salary value is initially -25,106.25, enter 25,106.25 in the Budgeted Salary field. Upon tabbing to the next field or hitting Enter, the Remaining Salary becomes .00. (See Figure 2.)
3. Save the record by clicking the Save icon or keying F10.

Oracle Developer Forms Runtime - Web
File Edit Options Block Item Record Query Help Window

Position Budget NBAPBUD 6.1 (BANUSER) (NONE)

Fiscal Year: 2004 Employee Class: BA Acad/Pro 12mth Ben Elig
Position No: U70079 Position Title: SPEC IT

Status: Active Type: Single Pooled COA: 9

Position Salary Budgets NBAPBUD 6.1 (BANUSER) (NONE)

Fisc: 2004 Orgn: 662000 Date Created: 01-JUL-2003
Status: Approved Budget ID: H2004 Salary Group:
COA: 9 Phase: HLAB04 Base Units: 12
Create FTE/Salary Records:

Position Budget Position Annual Budget Appointment Budget FTE
Basis Basis % =

12 / 12 * 100 = 1

	Budgeted	Encumbered	Expended	Remaining
Salary:	25,106.25	13,518.75	11,587.50	.00

WARNING Enter/change Actual Fringe Bdgt Amts when based on Pct of Salary Bdgt.
Record: 1/? <OSC>

Figure 2: Entering a value in Budgeted Salary to negate Remaining Salary amount.



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Organization Transfer

UI2 and AITS run automated scripts nightly that update tables affected by the values in the Salary fields on the Position Salary Budgets form.

If you attempt an Organization Transfer prior to the completion of these scripts, you will receive an error, “Cannot process transfer when Expended Amt > Amount posted to Finance.”

Upon the completion of these scripts, you can complete the Organization Transfer by following these steps:

1. In Banner, go to the Position Budget form (NBAPBUD), and Next Block (using the icon or CTRL + PAGE DOWN keys) to the Position Salary Budgets block.
2. If necessary, use the arrow keys or scroll bar to move to the appropriate Position Salary Budgets record.
3. Select Organization Transfer from the Options menu.
4. When you get the dialog box that says, “Process Organization Transfer,” click the OK button.
5. A new record opens reflecting all of the same information EXCEPT that the Orgn field is blank. Instructions at the bottom of the screen tell you to “Enter Organization to receive transferred funds; then press SAVE.” Enter the new Organization number in the Orgn field.

The screenshot shows the 'Position Salary Budgets NBAPBUD 6.1 (BANUSER) (0NONE)' window. The 'Orgn' field is highlighted with a red circle. The form contains the following data:

Fisc:	2004	Orgn:		Date Created:	04-MAY-2004		
Status:	Approved	Budget ID:	H2004	Salary Group:			
COA:	9	Phase:	HLAB04	Base Units:	12		
Create FTE/Salary Records: <input checked="" type="checkbox"/>							
Position Budget Basis	12	Position Annual Basis	12	Budget Appointment %	100	Budget FTE	1
Salary:							
Budgeted	13,518.75	Encumbered	13,518.75	Expended		Remaining	.00

Figure 3: Enter the new Organization code in the Orgn field.

6. Save the record by clicking the Save icon or keying F10.



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7. Click the OK button when you receive the message, “Transaction complete: 2 records applied; all records saved.”

Upon completion of the organization transfer, Banner gives a Warning that you should also change Position labor distribution values.

Updating the Position Labor Distribution

After adding the new organization code, update the Position labor distribution to reflect the new Fund, Organization, Account, and Program (FOAP).

1. Next Block (using the icon or CTRL + PAGE DOWN keys) three times to the Position Labor Distribution block of NBAPBUD.
2. Tab to or click on the Percent field for the existing FOAP(s) and change the value(s) to 0.
3. Click in the next available line and enter the new Fund, Organization, Account, and Program (FOAP) values.
4. Save the record by clicking the Save icon or keying F10.
5. Click the OK button when you receive the warning, “Job Labor Distribution data (NBAJOBS) may need similar changes. This message is informing you may need to update the Job labor distribution values on the Employee Jobs form (NBAJOBS) using the appropriate Electronic Personnel Action Form (EPAF).