



**Budgeting a Position on NWAPBAD**

<b>What you do...</b>	<b>Comments / Prompts</b>
Direct Access NWAPBAD	<b>POSITION BUDGET ADJUSTMENT FORM</b>
Enter a <u>Target Position Number</u>	The form will default in the last position number you touched. You can also type in a different position number (if known), or click on the Flashlight button to search for a desired position.
Select Next>Block	.
Enter the desired <u>Adjustment Amount</u> , as it affects the target position: <ul style="list-style-type: none"> <li>▪ To increase the target position, use a positive adjustment amount.</li> <li>▪ To decrease the target position, use a negative adjustment amount</li> </ul>	<p>Maximum amount for negative adjustments is 96,580.</p> <p>Banner will only allow negative position budget associated with positions that have an ECLS of Z0</p> <p>A zero amount may be specified in the adjustment amount field. You will not be able to access the source position block if the adjustment amount is zero. If you save this zero adjustment amount you will be asked if that is what you really wanted to do. If you respond yes, the transaction will be saved as “in process”. A subsequent transaction for the target position could not be entered until this transaction is removed or an amount is specified and the transaction completed.</p>
Tab to <u>Compensation Change Type</u>	Enter a value of “ADMNB” (Budget Adjustment)
Enter a <u>Comment</u>	<p>The suggested format for Comments is: MMDDYY Action</p> <p>Examples: 070102 Establish Position 070102 New Hire 080303 FTE Change</p>
Select Next>Block	All existing budget distribution lines and amounts for the position will automatically populate into the block.



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If desired, add or delete FOAPAL lines by selecting “Insert” from the Record menu.	The screen will leaf to the Position Labor Distribution form.
Add additional FOAPAL lines if desired.	<p>Add FOAPAL line</p> <p>To enter another FOAPAL line, press the “Arrow Down” key or function key F6.</p> <p>To use an existing FOAPAL line as a template, select “Duplicate” from the Record menu, or press function key F4. Update the desired fields on the duplicate line.</p>
Delete FOAPAL lines if desired.	<p>Delete FOAPAL line</p> <p>To delete a FOAPAL line, highlight the line you wish to delete. This line must have a Budget and a Budget to be Posted amount equal to zero. From the Record menu select Remove.</p>
SAVE	The screen will return to the Target Position block in NWAPBAD and display the message, “Don’t forget the final save.” Performing a save in the Position Distribution Form moves the data to a holding place but does not save the transaction. In order to save the transaction, a save must be performed in the Position Adjustment Form.
Enter an <u>Adjust Amount</u> for the desired Target Position FOAPAL line(s).	<p>Enter the desired <u>Adjustment Amount</u>, as it affects the target position line:</p> <ul style="list-style-type: none"> <li>▪ To increase the line, use a positive amount.</li> <li>▪ To decrease the line, use a negative amount.</li> </ul> <p>The total of the <u>Adjust Amounts</u> entered across all lines, must equal the <u>Adjustment Amount</u> in the previous block.</p>
Select a specific Target Position line to source	Navigate your cursor to the line you wish to source. Click in the FUND or AMOUNT field to highlight the line. Repeat until all lines have been sourced.
Select Next>Block OR Click in the Source block	You can toggle back and forth between the Target and Source blocks as needed.



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<p>Enter a <u>Source Posn</u></p>	<p>Enter a budgeted position or “NOSOFP” as source of funds. (multiple positions or combinations of budgeted positions and NOSOFP could be used)</p> <ul style="list-style-type: none"> <li>▪ If a budgeted position is entered, all existing budget distribution lines and amounts for the position will automatically populate into the block. The cursor will default to the Adjust Amount of the first FOAPAL line.</li> <li>▪ If NOSOFP is entered the cursor will default to No Source of Funds field.</li> </ul> <p>Always temporarily source CYA positions to an Appointment Variance or Adjust Budget Position, or NOSOFP. This will avoid timing issues with use of the permanent position as a source, before the employee is placed on leave. Once the employee is placed on leave, this position can be reduced using the same source, thus zeroing out the *PPB org.</p>
<p>Enter Source Position <u>Adjust Amount(s)</u></p>	<p>Navigate to the source line you wish to use, by clicking in the Adjust Amount field, and enter the desired amount.</p> <p>A Source Position may have multiple FOAPAL lines. You may source one Target Position line against multiple Source Position lines, as long as each line shares the same Fund value as the Target line being adjusted. Navigate to each line in turn, entering the desired Adjust Amount on each.</p> <p>Note that the Target and Source Position Adjust Amounts must have opposite signs, and net to zero.</p> <p>As each Target Position line is associated with a Source Position line, a check mark appears in the box to the left of the Target line. Before saving, note that all Target Position lines have been sourced.</p> <p>Prior to saving, you can change your source position without doing a record remove. Once you have saved, the source line will have to be removed if you need to change the source position.</p>



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SAVE	Banner will provide an “Applied records saved” message. If your Source Position(s) had multiple lines, all lines which were not used will be cleared, leaving only the lines with Adjust Amounts.
Select “Position Budget Adjustment Process” from the Options menu.	This will complete the transaction and create a “to be posted” amount on NBAPBUD. The “to be posted” amount will be picked up by processes and fed to Finance.  Banner will provide a message box, confirming that “Process is Complete”. Note that in the main screen window behind the message box, the transaction’s Status has changed from “In Progress” to “Complete”.
Click “O.k.” in the message box	Similar to a Rollback, the screen will clear, leaving only the Target Position Number in the first field at the top of the form.
Optional: Click on the flashlight on the Transaction Number field.	This will show you a listing of any completed and in process transactions. Double clicking on a transaction number will populate the form. If the transaction is a completed transaction, the Total Current Budget amount reflects all budget adjustments to date. Each FOAPAL line reflects only the change for the current and previous transactions.
Go to Options Menu	Select POSITION BUDGET INFORMATION FORM Banner moves to Position Budget form NBAPBUD
Fiscal Year and Position Number will default in	
Select Next>Block	
Select Next>Block -a <i>Second time</i>	Note: change in Budgeted Salary dollars
Go to Options Menu	Select POSITION LABOR DISTRIBUTION
Use the lower scroll bar to view information to the right	Note: ‘To Be Posted’ amount
Exit NBAPBUD (red door)	
Exit NWAPBAD (red door)	Banner will return to Direct Access