Online Grant Budget Transfers

Office of Sponsored Research and Programs (OSRP)

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Welcome to Online Budgeting for Grant Fund Numbers. This process will help users to move money between account codes in their fund number. The Office of Sponsored Research and Programs continues to foster an environment which encourages research, scholarly inquiry and creative activities by the faculty through technically assisting in the acquisition of extramural funding. If you have any questions, please contact our office at osrp@nccu.edu or 919-530-7333.

1. Log into My EOL (Go to www.nccu.edu and then click on My EOL in top right corner)
2. Select the Banner SSB link to access Banner Self Service
3. Select “Enter Secure Area (User Log In)"

4. Enter your Banner User ID Number 82XXXXXXX

5. Enter your PIN – it should be a six digit number.
6. Select the Finance Tab or Select the Finance Hyperlink

7. Select Budget Transfer

NOTE: Documents may be Viewed or Approved from this location, once it has been successfully completed.

- Approve Documents – Provides direct access to approve/disapprove documents under your User ID
- View Document – Allow viewing of document based upon document type and criteria entered by the User
- Budget Transfer – Provides template to enter budget transfer
- Multiple Line Budget Transfer – Provides template for multiple lines budget transfer within one Fund
8. Go to the Journal Type dropdown Menu and Select BTG – Budget Transfer- GRANT
9. Enter the Transfer Amount (This should equal the total amount being transferred)
10. Tab to each of the following fields and enter the information into the corresponding box:
11. Enter the Fund Number
12. Enter the Organization Code
13. Enter the Account Code
14. Enter the Program Code
15. Enter the Description –Limited to 35 positions
16. Budget Period - Select the appropriate period based upon the respective month i.e.
   July - 01       October – 04       January – 07       April - 10
   August -02      November – 05     February – 08       May - 11
   September – 03  December – 06     March – 09         June - 12

NOTE: The Debit and Credit indicator will be displayed with a minus (-) sign to reduce the budget line and then a plus (+) sign to increase the budget.

You MUST have the correct Fund, Organization, Account, Program code related to the specific fund, otherwise the entry will not process

17. Select - Complete
18. A document number will be presented upon successful entry.

19. Write down the Document number for future references.

20. The document will be forwarded to Office of Sponsored Research and Programs Approver Queue.

21. Please send the required documentation by email to osrp@nccu.edu.

Documentation for the Budget Transfers is **REQUIRED** for the following:

- Prior Approvals from the Sponsor
- Ordering items or equipment not disclosed in the current budget or notice of award
- Major changes resulting in 25% or more budget change (i.e. moving salaries to supplies resulting in the salary line changing more than 25% of the original budget)
Possible Errors

*Insufficient Funds* - If there is not enough funds in the budget the message will be received “Insufficient budget, sequence 1, suspending transaction”

SEQUENCE NUMBER - Sequence 1 is the From line / Sequence 2 is the To line
Possible Errors - Continued

Invalid Fund Number

If a fund number is invalid, a message will appear and the budget transfer will not process.
Possible Errors - Continued

Fund numbers must be a valid Ledger 5 Fund code, i.e. must begin with Number 5.

There are other possible errors and the error message will display precisely what is incorrect with the entry, make appropriate corrections and select the “Complete” button.
MULTIPLE LINE BUDGET TRANSFERS

The multiple line budget transfer will allow you to transfer to multiple account codes within the same fund number.

Proceed with the same steps as noted above with the exception of select “Multiple Line Budget Transfer”, this functionality allows for transferring to up to 4 Account codes within the same Fund.

For questions or assistance with on-line budget transfers, please contact osrp@nccu.edu or 919-530-7333.

Thank you for all that you do at NCCU!!
APPROVALS

There are several ways to approve documents.

1. Self Service, select the Approve Documents via either of the following

2. Select the Submit Query Tab

Note: This will display a list of documents for which either you are the Originator or the Next Approver.
The actions for which you have access will be enabled denoted in blue otherwise the action will be in black indicating it is not available for this User.

Specific Document Number - you may enter it in the Document Number Field

History – Allows viewing of the actual entry prior to approving
Once the Approver has reviewed the entry and satisfied, they may select the Approve Document feature and approve or disapprove the document.

Documents that have been disapproved will be returned to the Originator with a Message in Internet Native Banner or via the View Document process in Banner Self Service.
FOAUAPP - Approvals in Internet Native Banner
Approver will enter the User ID, perform a Next Block function; select the next action via the icon as provided on the form.

Approve Queue Icon provides a list of Users who have access to approve the specific document. Document may be approved on this form.
FOIAINP - To determine if there are Documents that need approval

FOIAPPH - Approval History

This form will allow you to perform a search via the Document code. Perform an Enter Query function via the Document code. The more information you may know about the document enter the information into the query to minimize the query result return.