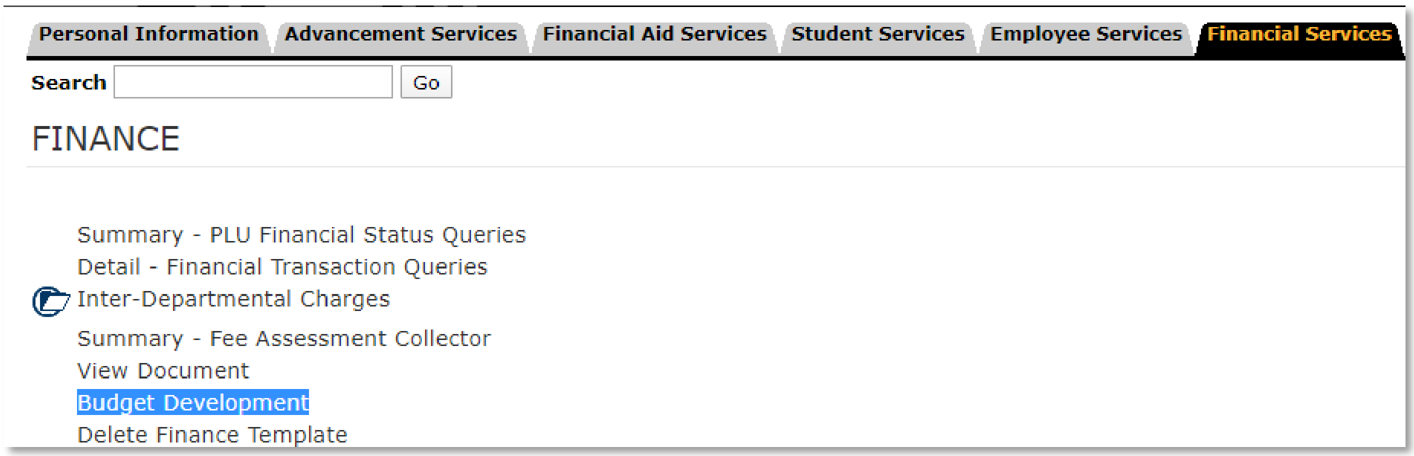
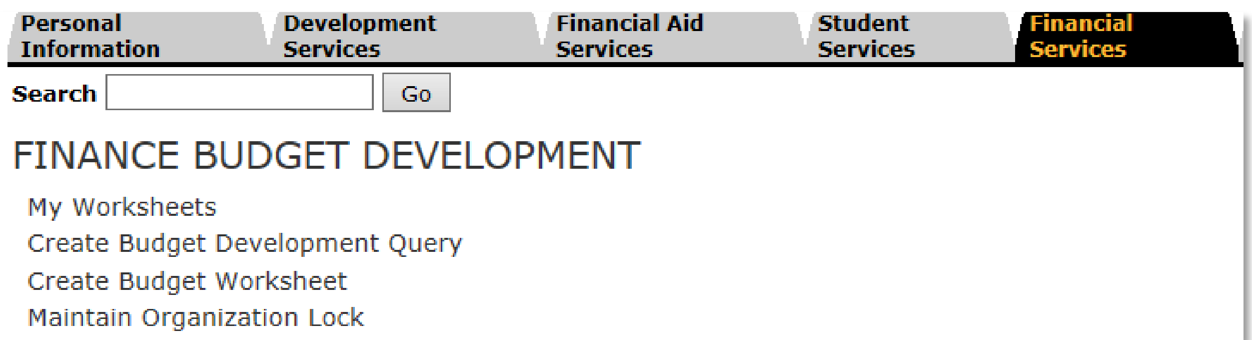
Self-Service Budget Development

How to View and Edit Your Budget

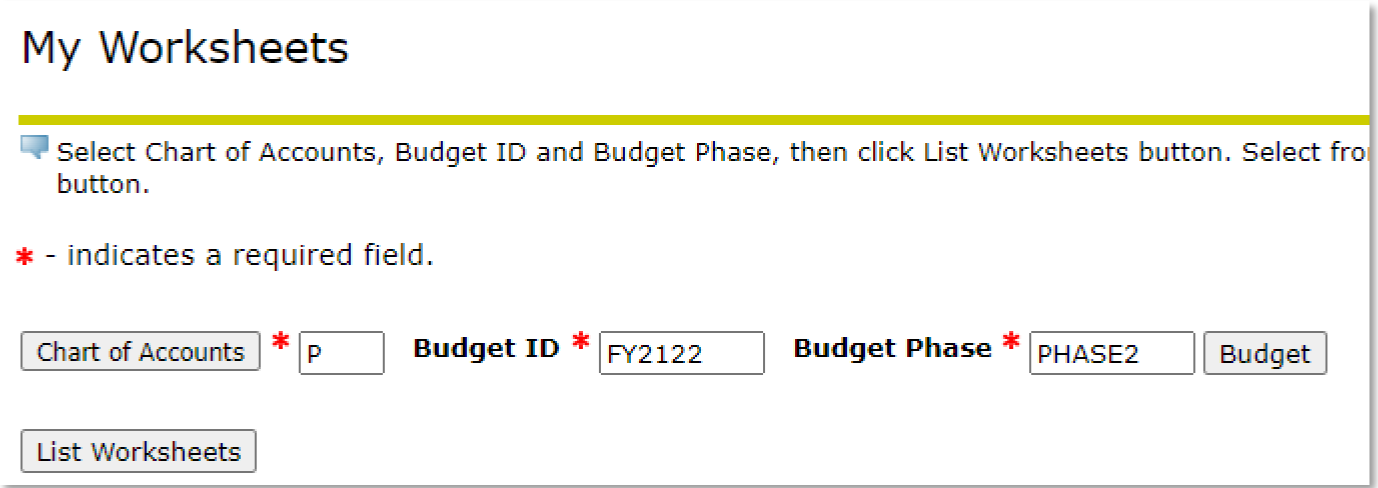
When you first log into Banner Self-Service, click into the Financial Services tab and then choose “Budget Development”. Your screen should look like this (you may have more or fewer tabs at the top):





Self-Service Budget Development

1) To view the list of Funds and Orgs you can edit, click “My Worksheets” from the Finance Budget Development menu.



2) Fill in the above information in the red star * fields.

a. Use “P” for Chart of Accounts, “FY2122” for Budget ID, and “PHASE2” for Budget Phase

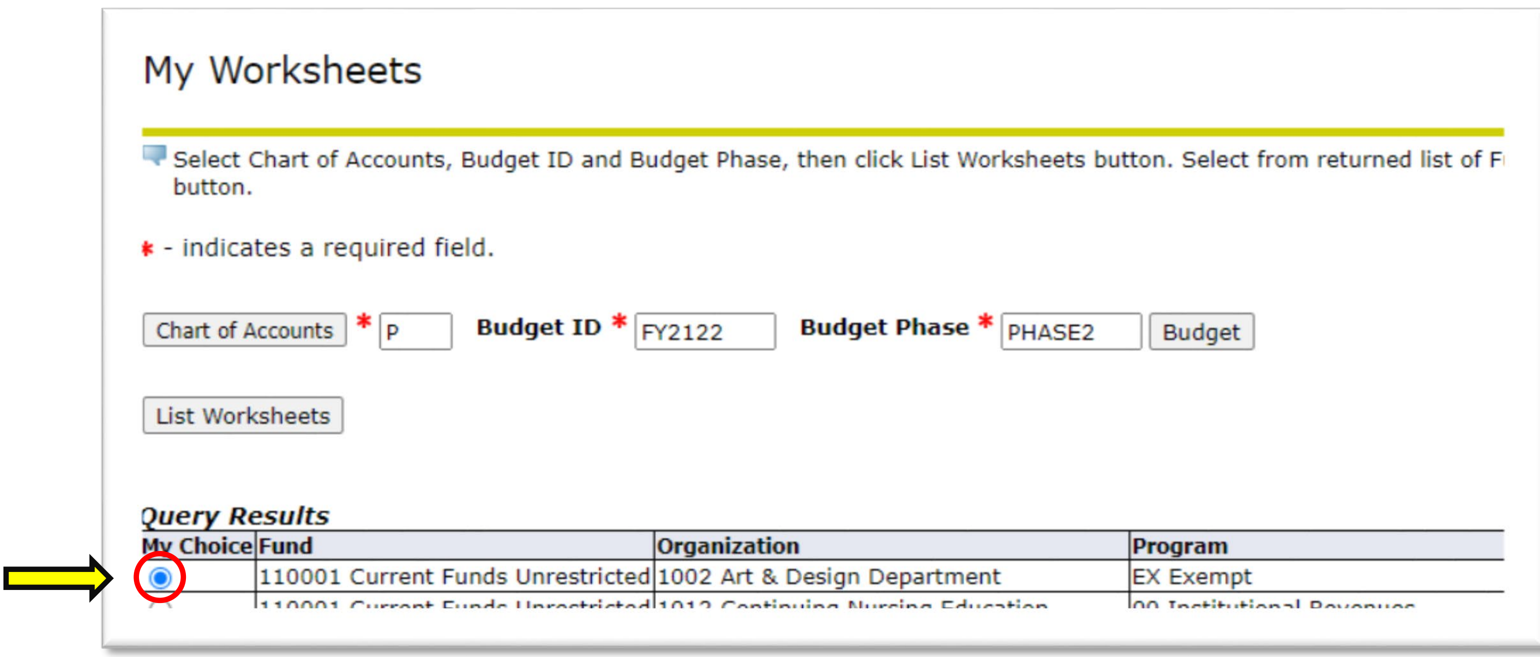
b. Note this data is only relevant for fiscal year 21-22.

c. Please do not experiment on this screen; use only the information provided here.

3) Click “List Worksheets” to see all the organization codes you have access to change.

a. **If you need to add a new Org, please see instructions on page 6 titled “How to Add a New Org Code to the ‘My Worksheets’ List”**

4) Click the radio button for the budget you want to work with. In the below example, 110001-1001.



5) Click “Submit” on the bottom of the page.

6) Now you should see the line item detail for the proposed budget on each account code within the org code you selected.

Worksheet

Status	Text	Program	Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Temporary Adopted	Temporary Adjustments	Base Budget	Budget Duration Code	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget	Delete Record
		61		Institutional Support												
			71	Departmental Expenditures												
	N		7102	Office/General Supplies	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7113	Trvl/Subs-Professional Development	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7121	Audit Services	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7126	Professional Services	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7131	Conference/Seminar Registration Fee	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7133	On Campus Meeting & Event Expenses	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7134	Professional Development	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7141	Photocopying	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7142	Printing & Publications	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7144	Postage & Mailing	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7145	Telephone & Fax	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7151	Equipment Purchases	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7154	Computer Hardware	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7164	Prizes/Awards/Discounts	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐
	N		7167	Software Licenses/Contracts	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00	☐

7) Now you are able to make changes to the amount in the “New Budget” column by entering positive and negative amounts in the “Change Value” box and clicking the “Post” button

Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Temporary Adopted	Temporary Adjustments	Base Budget	Budget Duration Code	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget
	Institutional Support											
71	Departmental Expenditures											
7102	Office/General Supplies	0.00	0.00	0.00	0.00	0.00	P	0.00	500	☐	0.00	0.00
7113	Trvl/Subs-Professional Development	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00
7121	Audit Services	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00
7126	Professional Services	0.00	0.00	0.00	0.00	0.00	P	0.00	-500	☐	0.00	0.00
7131	Conference/Seminar Registration Fee	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00
7133	On Campus Meeting & Event Expenses	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00

Requery | Calculate | Post

Download All Worksheet Columns | Download Selected Worksheet Columns

Account Type/Code	Title	Adopted Budget	Permanent Adjustments	Temporary Adopted	Temporary Adjustments	Base Budget	Budget Duration Code	Proposed Budget	Change Value	Percent	Cumulative Change	New Budget
	Institutional Support											
71	Departmental Expenditures											
7102	Office/General Supplies	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	500.00	500.00
7113	Trvl/Subs-Professional Development	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00
7121	Audit Services	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00
7126	Professional Services	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	(500.00)	(500.00)
7131	Conference/Seminar Registration Fee	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00
7133	On Campus Meeting & Event Expenses	0.00	0.00	0.00	0.00	0.00	P	0.00		☐	0.00	0.00

8) By clicking “Post” you are making real changes in the budget module. If you would like to see how changes look without posting them, you can use the “Calculate” and “Requery” buttons:
   a. Clicking “Calculate” will make the changes to the New Budget column. Think of it as a preview button.
   b. Clicking “Requery” will revert the Worksheet back to how it looked the last time you clicked “Post”.

9) All changes are tracked by the system, you can view the history of your changes by clicking the blue number in the Proposed Budget Column.

How to Add Notes

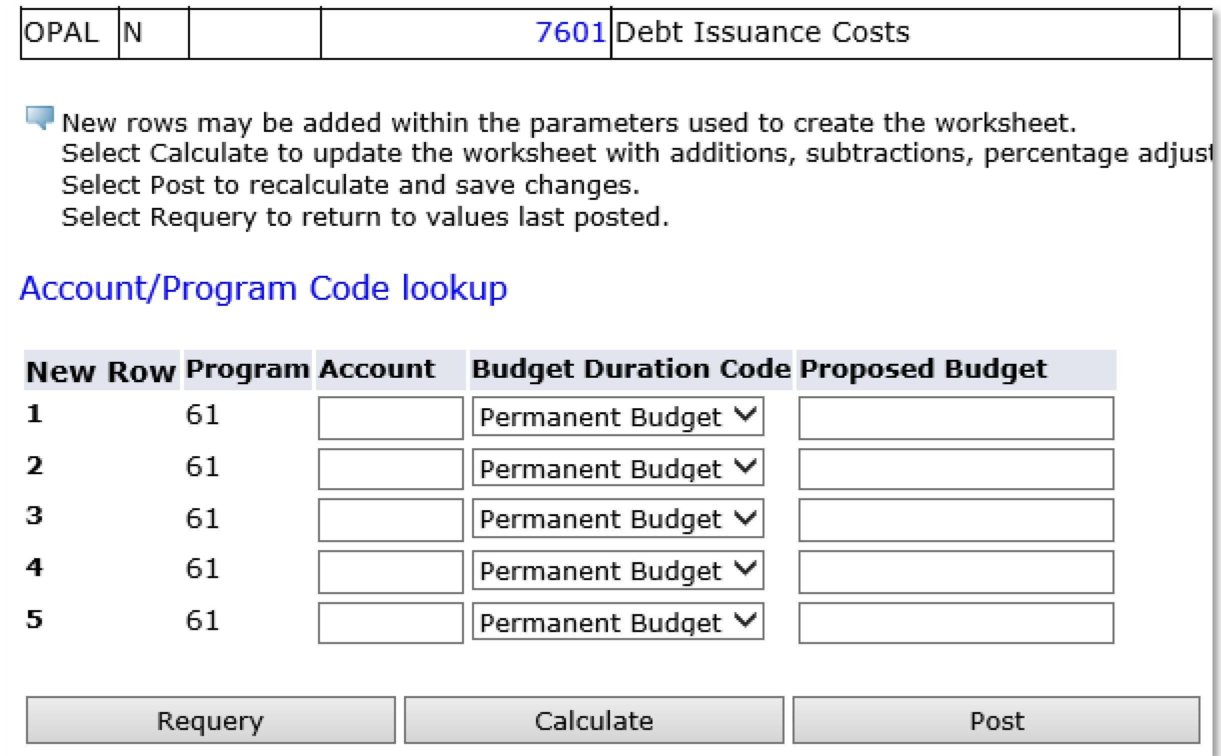
1) You can add notes to your changes by clicking on the blue account code in the Account Type/Code column.

2) A new window will pop up for you to type a message or comment.

3) Click “Save”.

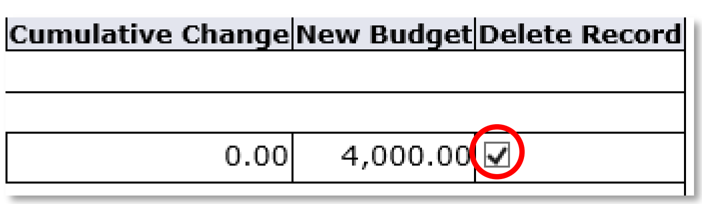
How to Add and Delete Account Codes

Below the worksheet for entering budget changes is where you can add new account codes to budget for.



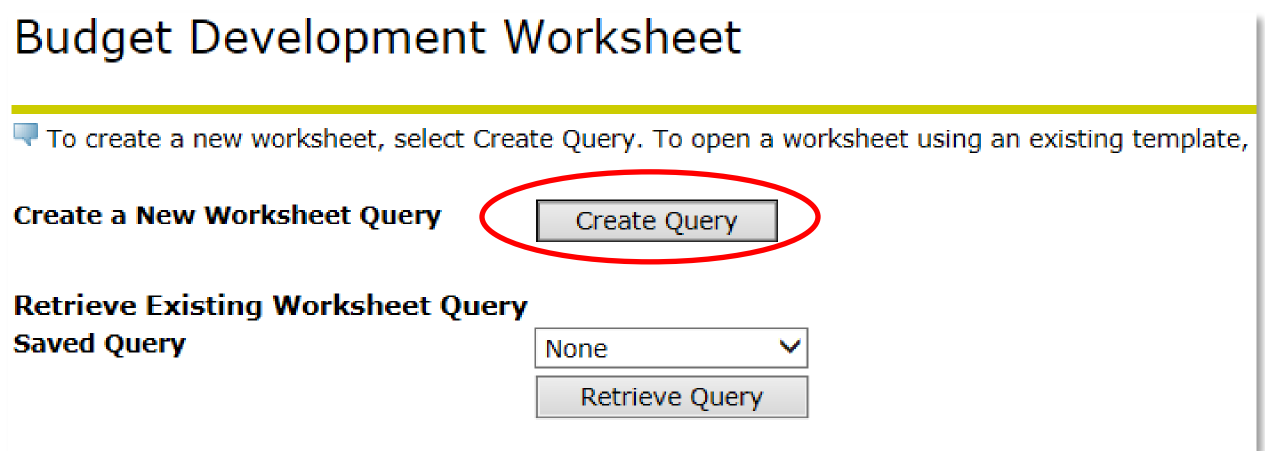
1) Fill in the new account code you want to add.
2) If this change only needs to be made for one year, change the "Budget Duration Code" drop down to "Temporary Budget" otherwise leave it as Permanent Budget.
3) Fill in the budget amount that you want on that line.
4) Click "Calculate" to see a preview or "Post" to make the change permanent.

5) To delete a line, click the check box on the right hand side of the worksheet in the "Delete Record" column, and then click the "Post" button.

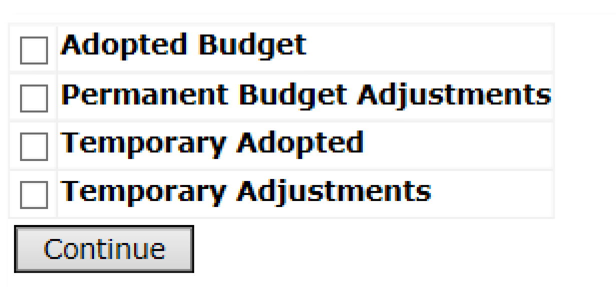


How to Add a New Org Code to the "My Worksheets" List

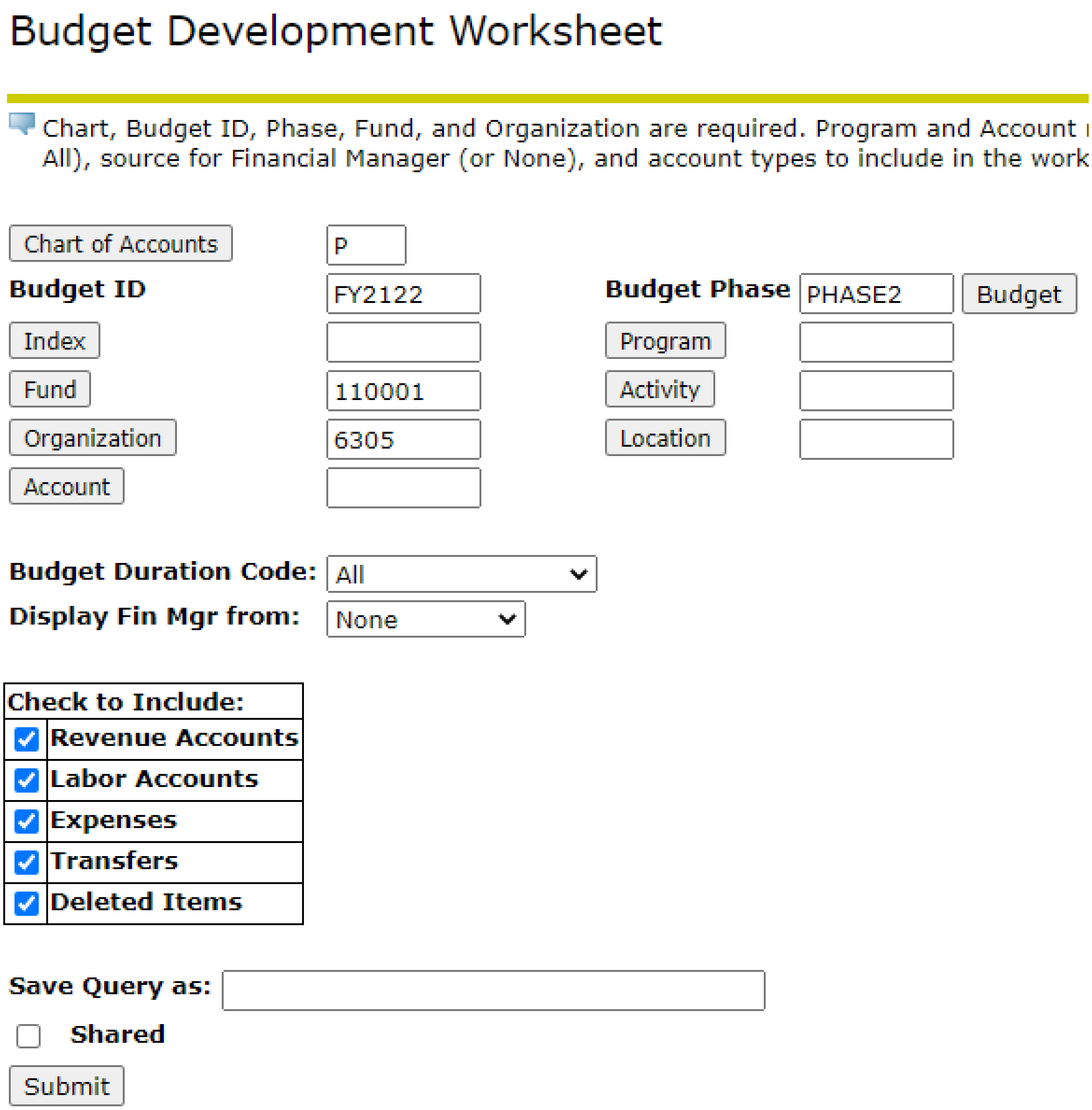
1) Click "Create Budget Worksheet" from the home page, then click "Create Query"



2) On the next screen you do not need to check any of the boxes, click "Continue"



3) You will need to enter a Chart of Accounts, Budget ID and Budget Phase in addition to one Fund and Org you are responsible for creating.



a. Enter the information as shown in the image; Chart of Accounts: “P”, Budget ID: “FY2122”, and Budget Phase: “PHASE2”
b. Enter “110001” in the **Fund** field
c. Enter an **Organization** code you have access to edit
d. Leave Budget Duration Code as “All”
e. Leave Display Fin Mgr from as “None”
f. Click all check boxes in the “Check to Include:” list
g. Click Submit

4) Now you should be able to view and edit the budget for the Org code you searched for as explained in the instructions above. It should also now appear in your list for “My Worksheets”.

5) If after adding the Org per the instructions above, and you are still not able to see it in “My Worksheets”, please contact the Business Office. Your Banner access for that Org may need to be established.