

# New Banner Self Service 9 Budget Adjustment Entry Instructions

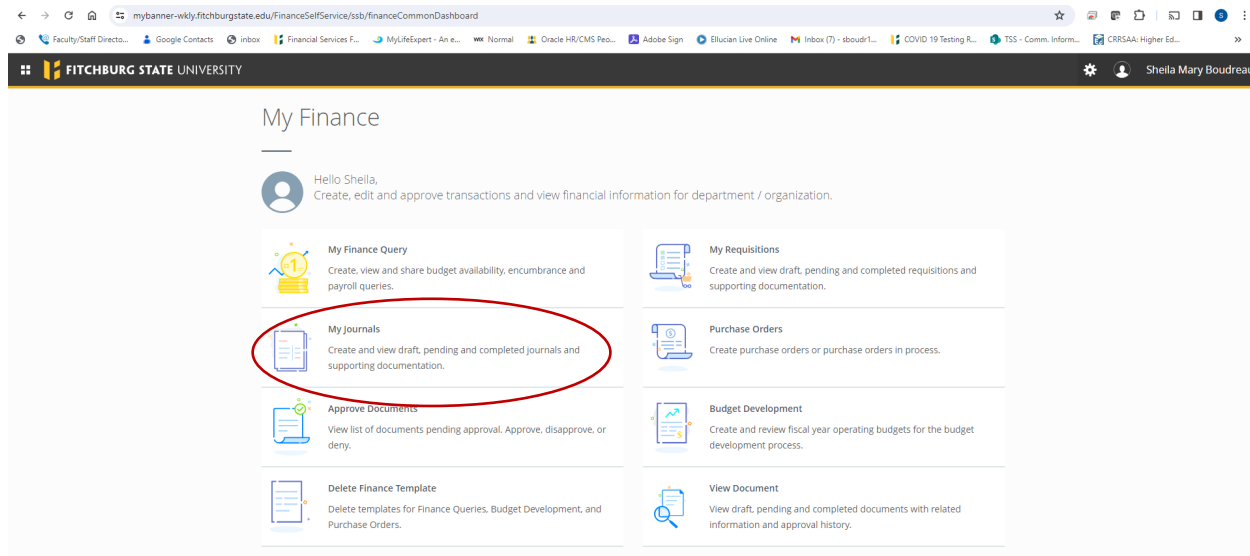
**Go to:**

<https://www.fitchburgstate.edu/campus-life/campus-services/technology/banner>

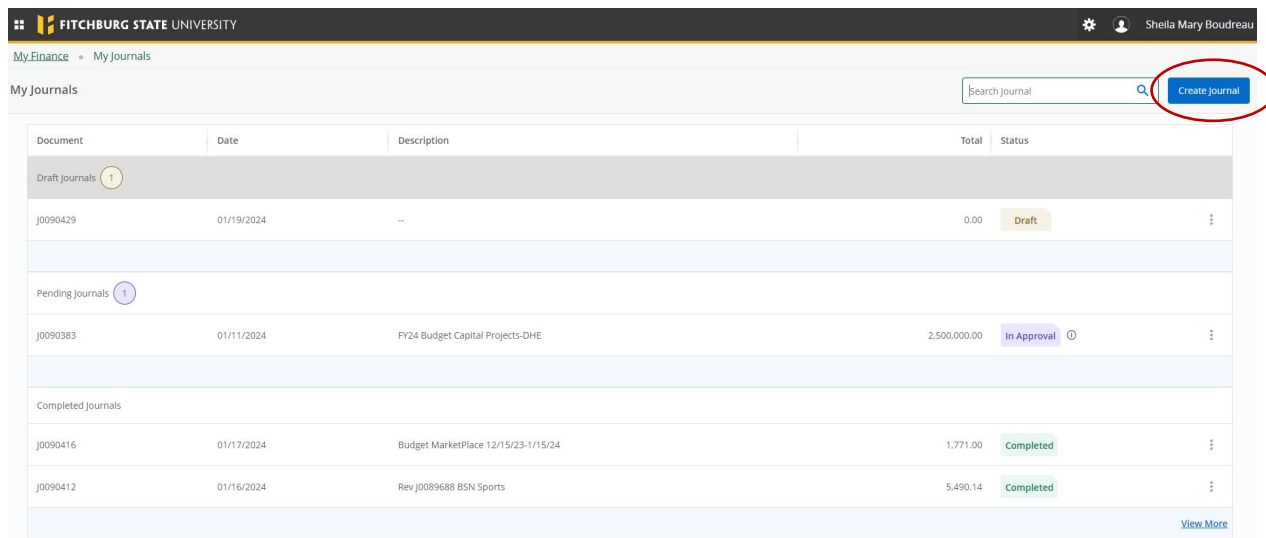
**Then:**



## 1: Select “My Journals”

A screenshot of the "My Finance" dashboard. The dashboard has a header with the Fitchburg State University logo and the user's name, Sheila Mary Boudreau. Below the header, there is a greeting "Hello Sheila, Create, edit and approve transactions and view financial information for department / organization." The main area contains several tiles: "My Finance Query", "My Requisitions", "My Journals" (circled in red), "Purchase Orders", "Approve Documents", "Budget Development", "Delete Finance Template", and "View Document". The "My Journals" tile is highlighted with a red circle.

## Step 2: Select “Create Journal” (top right)

A screenshot of the "My Journals" page. The page has a header with the Fitchburg State University logo and the user's name, Sheila Mary Boudreau. Below the header, there is a breadcrumb trail "My Finance > My Journals". The main area contains a table with columns: Document, Date, Description, Total, and Status. The table is divided into three sections: "Draft journals", "Pending journals", and "Completed journals". The "Create Journal" button is circled in red in the top right corner. The table data is as follows:

Document	Date	Description	Total	Status
Draft journals 1				
J0090429	01/19/2024	--	0.00	Draft
Pending journals 1				
J0090383	01/11/2024	FY24 Budget Capital Projects-DHE	2,500,000.00	In Approval
Completed journals				
J0090416	01/17/2024	Budget MarketPlace 12/15/23-1/15/24	1,771.00	Completed
J0090412	01/16/2024	Rev J0089688 BSN Sports	5,490.14	Completed

The transaction Date will auto fill.

**Step 3:** Fill in the following information only (circled and highlighted)

**Journal Type:** BD02

**Description:** Describe the reason for moving the budget

**Budget Period:** 01

**My JV Public Comment/My Private Comment:** this is optional

**Click Create:** located at the bottom in the center

Transaction Date \*

02/01/2024

☐ Redistribution

☒ NSF Checking

Distribution Total

☐ Deferred Edit

Accounting Defaults

Journal Type

BD02 Permanent Budget Adjustments x v

Bank Code

Choose Bank Code v

Budget Period

01 x v

Description

Your Description Here

Deposit

Currency

Choose Currency Code v

Journal Comments

Public Comment ^

Enter public comments for the journal

CREATE

**Step 4:** Add FOAPAL as you normally would (type in, do not use drop down). Only fill in the circled information, leave others blank.

Add accounting
✕

Sequence Number : 1
Status :

Journal Type \*

BD02 Permanent Budget Adjustments x v

Chart \*

1 Fitchburg State University x v

Index

Choose Index v

Fund

T65 University Fee Trust Fund x v

Organization

4010 Financial Services x v

Account

B00 Pool Budget Account x v

Program

0000 No Program Code x v

Location

Choose Location v

Activity

Choose Activity v

Project

Choose Project v

SAVE

ADD ACCOUNTING

**Step 5:** Scroll down to enter dollar amount

**Amount:** Enter Amount of transfer

**Debit/Credit:** Enter Minus-/Plus +, using drop down

No other information is needed

**Click ADD ACCOUNTING** on bottom right to create the second sequence

Sequence Number : 1

Status : ✔ Postable

Percent

Amount \*

50.00

Debit/Credit \*

- Minus

☐ NSF Override

Document Reference

Description \*

Banner SS9

Budget Period

01

Bank

Choose Bank Code

☐ Accrual Indicator

Deposit

Currency

Choose Currency Code

Encumbrance

Encumbrance Number

Action

ADD ACCOUNTING

SAVE

**Step 6:** Enter second sequence FOAPAL

Add accounting

Sequence Number : 2

Status :

Journal Type \*

BD02 Permanent Budget Adjustments

Chart \*

1 Fitchburg State University

Index

Choose Index

Fund

T65 University Fee Trust Fund

Organization

4010 Financial Services

Account

E00 Pool Budget Account

Program

0000 No Program Code

Location

Choose Location

Activity

Choose Activity

Project

Choose Project

SAVE

ADD ACCOUNTING

Scroll down to enter dollar amount

**Amount:** Enter Amount of transfer

**Debit/Credit:** Enter Minus-/Plus +, using drop down

No other information is needed  
If no additional lines needed  
Click **SAVE** on bottom left

Add accounting

Sequence Number : 2

Status :

Percent

Amount \*

50.00

Debit/Credit \*

+ Plus

☐ NSF Override

Document Reference

Description \*

Banner SS9

Budget Period

01

Bank

Choose Bank Code

☐ Accrual Indicator

Deposit

Currency

Choose Currency Code

Encumbrance

Encumbrance Number

SAVE

ADD ACCOUNTING

**Step 7:** Your budget transfer will be in the DRAFT version for your review, once you are satisfied hit Submit Journal on the lower right hand side:

FITCHBURG STATE UNIVERSITY

Sheila Mary Boudreau

My Finance • My Journals • J0090435

J0090435

Search Accounting

Transaction date :02/01/2024    Total :100.00    Status : Draft

Accounting Distribution 2

Sequence	Status	Type	Chart	Percent	Amount	Debit/Credit	Index	Fund	Organization	Account	Program	Activity
<input type="checkbox"/> 1	✓	BD02	1	--	50.00	- Minus	--	T65	4010	800	0000	--
<input type="checkbox"/> 2	✓	BD02	1	--	50.00	+ Plus	--	T65	4010	E00	0000	--

Accounting total : 100.00

+

 Add accounting

Back

Save as draft

Submit Journal

You may write down your Journal # if you keep track, otherwise you can find this # by drilling down in Banner.