

New Banner Self Service 9 Budget Adjustment Entry Instructions

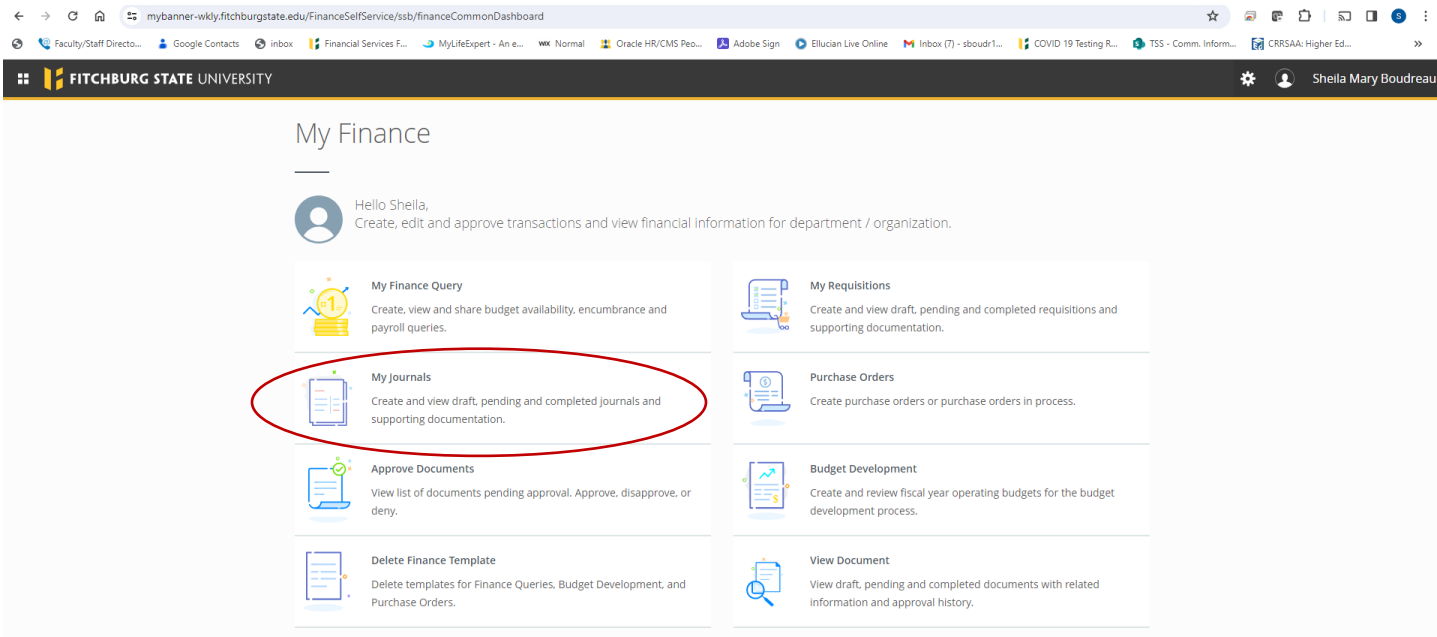
Go to:

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

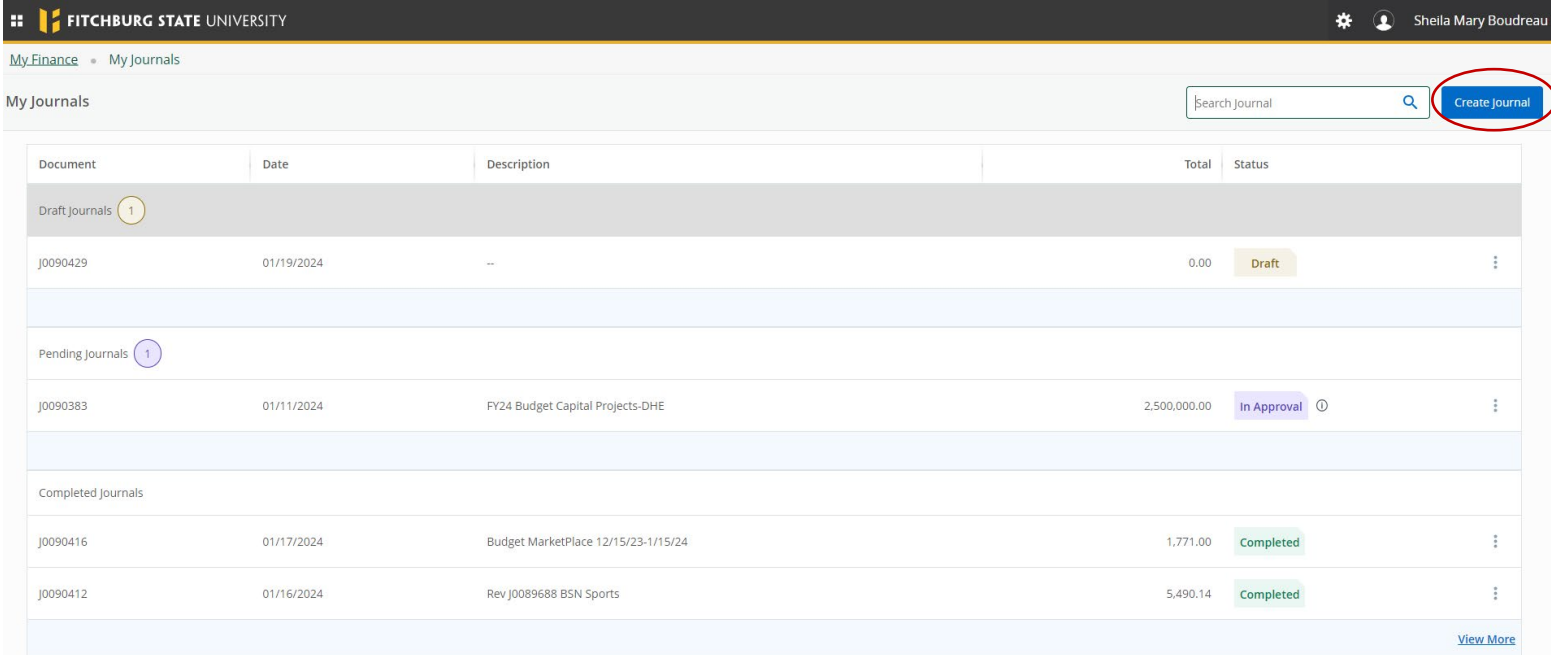
Then Select:



1: Select "My Journals"



Step 2: Select "Create Journal" (top right)



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

Journal Type: BDX

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

Create Journal ✕

Transaction Date *

05/28/2024

Redistribution

NSF Checking

Distribution Total

Deferred Edit

Accounting Defaults

Journal Type

BDX Permanent Budget Adj- 2 sided entry
✕ ▼

Bank Code

Choose Bank Code
▼

Budget Period

01
✕ ▼

Description

Deposit

Currency

Choose Currency Code
▼

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 *
BDX Permanent Budget Adj- 2 sided entry x v

Chart * Index
1 Fitchburg State University x v Choose Index v

Fund
T65 University Fee Trust Fund x v

Organization
4010 Financial Services x v

Account Please remember to use the pool account (ex: B00, not B01)
B00 Pool Budget Account x v

Program Location
0000 No Program Code x v Choose Location v

Activity Project
Choose Activity v 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

Add accounting ✕

Sequence Number : 1 Status :

Percent

Amount * **Debit/Credit ***

50.00 - Minus ✕ ▼

NSF Override Document Reference

Your Description here Budget Period

01 ✕ ▼

Bank Accrual Indicator

Choose Bank Code ▼

Deposit Currency

Choose Currency Code ▼

Encumbrance

Encumbrance Number Action

SAVE **ADD ACCOUNTING**

Step 6: Enter second sequence FOAPAL

Sequence Number : 2



Status : Postable

Journal Type *

BDX Permanent Budget Adj- 2 sided entry 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

Please remember to use the pool account (ex: B00, not B01)

E00 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

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 *

Debit/Credit *

NSF Override

Document Reference

Description *

Budget Period

Bank

Accrual Indicator

Deposit

Currency

Encumbrance

Encumbrance Number

Action

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:

Accounting Distribution 2

Sequence	Status	Type	Chart	Percent	Amount	Debit/Credit	Index	Fund	Organization	Account	Program	Activity
<input type="checkbox"/> 1	✔	BDX	1	--	50.00	- Minus	--	T65	4010	B00	0000	--
<input type="checkbox"/> 2	✔	BDX	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 going to My Journals and looking at Completed Journals.

FITCHBURG STATE UNIVERSITY Sheila Mary Boudreau

My Finance • My Journals

My Journals Search Journal Q Create Journal

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

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