Self Service Banner - Budget Development Instructions

Access Budget Development:
- From Samford homepage select Portal Login
- Login using Samford credentials
- From Employee tab select Banner
- Select Finance
- Select Budget Development drop down
- Select Create Budget Worksheet

Access Budget:
- Select Create Query
- Check both boxes
- Select Continue
- Chart of Accounts: S
- Budget ID: 1920OR
- Index: blank
- Fund: enter six digit fund (for example most operating budgets are 110500)
- Organization: enter six-digit org
- Account: blank
- Budget Phase: enter phase (YOU MUST ENTER THE CORRECT PHASE FOR THE TYPE OF FUND APPLICABLE, OTHERWISE YOU WILL NOT ACCESS THE CURRENT BUDGET, AND THIS WILL CAUSE A DUPLICATION OF ANY BUDGET YOU ENTER)
  - 19_UNR (operating budgets, usually fund 110500)
  - 19_GFT (for annual gift funds 21’s and 23’s)
  - 19_END (for 22 endowed funds)
  - 19_DES (for 111 designated funds)
  - 19_GNT (for 24 grant funds)
- Program: blank

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• Activity: usually blank however, there are some budgets that utilize activity codes. YOU MUST INCLUDE THE ACTIVITY CODE, IF APPLICABLE, OTHERWISE YOU WILL NOT ACCESS THE BUDGET AND THIS WILL CAUSE A DUPLICATION OF ANY BUDGET YOU ENTER
• Submit

Key in Budget Amounts:
• Enter changes in Change Value column
• Add new lines using blocks at the bottom (include BOTH program and account)
• Select Calculate to update balances
• Select Post to save changes. You must click POST or the budget will not be saved

Important Final Step:
Reconcile Summary Totals at the bottom. Cumulative net changes should equal zero, unless there were budget moves across Orgs or there is approved “new funding”.

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