

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: **2021OR**
- 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)
 - 21_UNR (operating budgets, fund 110500, 110550, and other 110xxx funds)
 - 21_GFT (for annual gift funds 21's and 23's)
 - 21_END (for 22 endowed funds)
 - 21_DES (for 111 designated funds)
 - 21_GNT (for 24 grant funds)
- Program: **blank**

- 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 be not be greater than **zero**, unless there were budget moves across Orgs or there is approved “new funding”.