

Sul Ross University

Creating a Self-Service Budget Transfer

1. Log in to Self Service Banner:

SR | SUL ROSS
THE FRONTIER UNIVERSITY OF TEXAS

EMAIL | ONEDRIVE | BLACKBOARD | MY DEGREE PLAN

MYSRSU HOME LTAC (TECH HELP) UCTV CONTACT SRSU RESLIFE MAINTENANCE REQUEST

2022-2027 SRSU Strategic Plan:
Our Student-Centric Focus

QUICK LINKS

- INFORMATION
- SERVICES
- CAMPUS LIFE
- RESOURCES

QUALTRICS

my Account

- LoboOnline Links:
 - My Personal Profile
 - Student Dashboard
 - Employee Dashboard
 - Faculty Dashboard
- Dinina Menu

my Courses

- My Schedule
- My Degree Plan
- HOLDS

Student Services

- Housing
- Financial Aid
- Registrar
- Academic Center for Excellence

SR Info

- Course Information (HB2504)
- Faculty and Staff Directory
- Banner

2. Open 'Finance Dashboard' under Banner PROD:

Contact our [Help Desk](#)

Banner PROD

Please click on the link(s) below to access Banner PROD. You will need to use your loboid in order to access the system.

- [Banner 9 Admin Pages](#) (Must be on-campus or VPN to access)
- [Apex Reports & Applications](#) (Must be on-campus or VPN to access)
- [Evisions \(Argos, FormFusion, IntelliCheck\)](#) (Must be on-campus or VPN to access)
- Lobo Online
 - [Faculty / Advisor Dashboard](#)
 - [Student Dashboard](#)
 - [Employee Dashboard](#)
 - [Finance Dashboard](#)
 - [Direct Timesheet Link](#)
- [Blackboard](#)
- [Degreeworks](#)

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3. Click on My Journals:



4. In the top right corner, click on the **BLUE** 'Create Journal' button.



*This screen will also show you any entries you have ever done and pending entries that have yet to be approved. Under Drafts it will also let you see any entries that have been disapproved by the Budget Office. *

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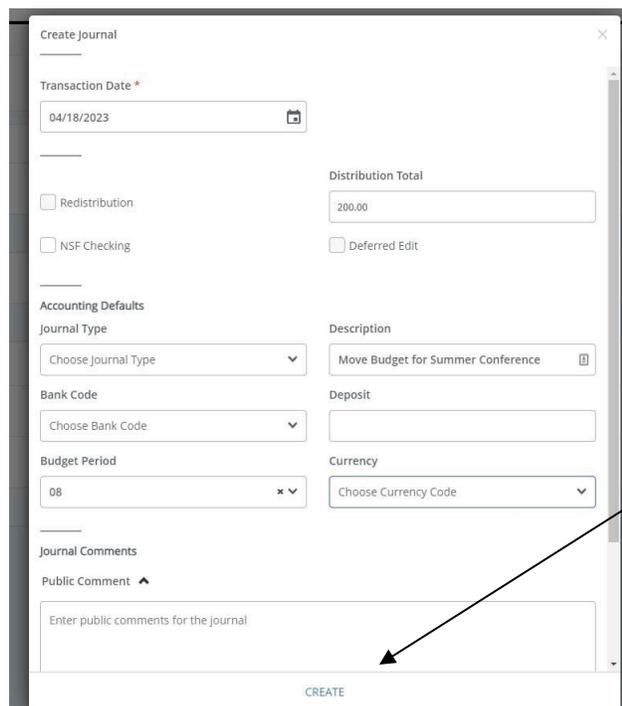
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5. The Create Journal pop-up screen will appear. On this screen fill out the following:

- A. **Distribution Total**: Should be doubled. Ex. If you are trying to move 100.00, Your Distribution Total would be 200.00.
- B. **Journal Type**: Type in DEPT in the drop down.
- C. **Description**: What you are trying to do. Ex- Move Budget for Summer Conference
- D. **Budget Period**: Sul Ross's Fiscal Year runs from September (01)-August (12).

September- 01	January - 05	May - 09
October-02	February - 06	June - 10
November-03	March - 07	July - 11
December- 04	April - 08	August -12

F. Click **Create**



The screenshot shows a 'Create Journal' form with the following fields and options:

- Transaction Date ***: 04/18/2023
- Distribution Total**: 200.00
- Redistribution**:
- NSF Checking**:
- Deferred Edit**:
- Accounting Defaults**
 - Journal Type**: Choose Journal Type (dropdown)
 - Bank Code**: Choose Bank Code (dropdown)
 - Budget Period**: 08 (dropdown)
- Description**: Move Budget for Summer Conference
- Deposit**: (empty field)
- Currency**: Choose Currency Code (dropdown)

Journal Comments

Public Comment (expandable): Enter public comments for the journal

CREATE button (highlighted by an arrow)

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6. Sequence Number 1: screen will appear.

Fill out the following:

- A. Journal Type: DEPT – Tempt Budget Adjustment
- B. Chart: U (always U)
- C. Fund: Click the drop-down arrow and either type in the Fund or scroll down to the Fund you are wanting.
- D. Org: Click the drop-down arrow and either type in the Org or scroll down to the Org you are wanting.
- E. Account: This is where you are going to choose or type in the pool you want to move it to (O&M-720000 or Travel – 710000).
- F. Program: Click the drop-down arrow and either type in the Program or scroll down to the Program you want.
- G. Amount: Put the amount you want to move. Ex. 100.00
- H. Debit/Credit: choose **+PLUS**
- I. Click **ADD ACCOUNTING**

Add accounting

Sequence Number : 1 Status :

Journal Type *

DEPT Dept Temporary Budget Adjustment x v

Chart *

U Sul Ross State University x v Index

Choose Index v

Fund

Choose Fund v

Organization

Choose Organization v

Account

Choose Account v

Program Location

Choose Program v Choose Location v

Activity Project

Choose Activity v Choose Project v

Percent

SAVE ADD ACCOUNTING

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8. Click **Submit Journal** - Button in the bottom right corner.

The screenshot shows the 'My Journals' page for journal J2302589. The status is 'Draft'. The 'Accounting Distribution' table is as follows:

Sequence	Status	Type	Chart	Percent	Amount	Debit/Credit	Index	Fund	Organization	Account	Program	Activity
1	✓	DEPT	L	--	100.00	+ Plus	430001	140001	30001	71000	600	--
2	✓	DEPT	L	--	100.00	- Minus	430001	140001	30001	72000	600	--

The 'Accounting total' is 200.00. At the bottom right, there are buttons for 'Back', 'Save as draft', and 'Submit Journal'. An arrow points to the 'Submit Journal' button.

9. After submitting journal, it will ask you if you want to submit J0000000. Click **Yes**.

The screenshot shows the same 'My Journals' page, but with a confirmation dialog box overlaid. The dialog box asks: 'Do you want to submit journal J2302589?' with 'NO' and 'YES' buttons. The 'Submit Journal' button from the previous screenshot is now highlighted in a darker shade, indicating it has been clicked.

10. The My Journals screen will come back and show you that Budget Entry you just submitted is now pending. That means it is in the Budget queue to review, approve and/or disapprove.

The screenshot shows the 'My Journals' screen with a list of journals. The 'Pending journals' section has a count of 1. The journal J2302589 is listed with the status 'In Approval'.

Document	Date	Description	Total	Status
Draft Journals (0)				
Pending journals (1)				
J2302589	04/18/2023	Move Budget for Summer Conference	200.00	In Approval

11. Once Budget approves an entry, it will show up in the Completed Journals section at the bottom.

The screenshot shows the 'Completed Journals' section of the 'My Journals' screen. Two journals are listed as completed.

Document	Date	Description	Total	Status
Completed Journals				
J2302584	04/18/2023	Perm Sal Adj POS495734	1,142.00	Completed
J2302570	04/17/2023	Perm Sal Adj POS441992	2,565.00	Completed

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12. If the budget entry has been disapproved by Budget Office, then the entry will show back up under Draft Journals.



Document	Date	Description	Total	Status
Draft Journals 1				
J2302589	04/18/2023	Move Budget for Summer Conference	200.00	Disapproved

Notes: For assistance or questions regarding budget queries, please contact the Budget Office at SR.Budget@sulross.edu.