Approving Budgets in Banner

The Budget Development menu within the Finance section of Self-Service Banner allows a user to modify his/her departmental budget on the web.

Open an internet browser. From the Lafayette Home page, select the Offices & Resources link at the top right, and locate the Banner Self-Service link in the left hand column.

At the login screen, enter your User ID and password. This should be the same User ID and password you use to access the Lafayette College network. If you have trouble logging in, select the “frequently asked questions” link on the login page.

Self Service will be personalized depending on individual permissions. Most employees see three sections: Personal Information, Employee, and Finance. If you don’t see the Finance section, please fill out a Banner Finance Access Request Form located on the Finance and Administration’s website.
Once you open the Finance link, you will see various functions. If you are responsible for submitting or approving a budget for one or more Banner “Orgs,” one of the options will be the “Budget Development Menu.”

Click on “My Worksheets”

- In the Chart of Accounts field, fill in “L” (a capital letter L);
- In the budget ID field, fill in “12 13” (12 space 13) for the FY2012-13 budget;
- In the Budget Phase field, fill in the information provided by the Finance and Administration Division. In the example, we will use “13EXP2”;
- Click on the “List Worksheets” button.

You should now see a list of the Fund-Org combinations for which you have budget responsibilities. Select one from the list and click the “Submit” button on the bottom of the page. Banner will then open the Budget Development Worksheet for that Fund-Org.
The Adopted Budget Column will show you the original Board-approved budget for the immediately previous fiscal year. The next three columns will show you any budget adjustments that may have been made during the year. The Base Budget column is the sum of the original adopted budget and any permanent budget adjustments for the immediately previous fiscal year.

The Proposed Budget shows the total allocation submitted by the Department Head for the upcoming fiscal year for that Fund-Org.

- Ensure that the Proposed Budget total (in the Summary Total section on the bottom of the page) is the approved amount.
- If any of the numbers in the Proposed Budget column are in blue font, if you click on the number you will see a history of the changes made that affected that line item.
- If the “Text” column (second to the left) has a “Y” indicated next to a particular line item, click on the Account Code (in blue font) to see the supplemental explanation or text that was provided by the person submitting the budget.
- If you want to change the allocation between line items/account numbers, you may but be sure the Proposed Budget total does not change. [See the directions for Submitting a Budget.]
Be sure the Proposed Budget total is the approved amount.

If there is a "Y" in the Text column as there is here, you can click on "710349" to view any supplemental text provided.

If a number in the Proposed Budget column is in blue type, you can click on it to see the history of the changes to that number.
If you are satisfied with the proposed budget, you can “lock” it to prevent any further changes. To apply the lock, return to the main “Budget Development Menu” by clicking the link on the very bottom of the page (in the far lower right).

Select “Maintain Organizational Lock.”

Make sure the Chart of Accounts, Budget and Phase fields are populated; the Phase should be included in the Phase 1 field. If you only want to see those budgets which you have not yet approved/locked, then select “Unlocked” from the Current Status dropdown menu. [You can leave Organization blank.] Click the “Submit” button.

From the list of budgets presented, click the “Change Status” button to the right of the budget you want to lock. Then hit the “Update” button on the bottom of the page and you will see the Status change from Unlocked to Locked. If you need to Unlock it again for any reason, you may change the status back to Unlocked until and unless Finance and Administration has applied the lock. If there is a budget you wish to lock that is not appearing on the list, please contact Kari Fazio (330-5957 or faziok@lafayette.edu) for assistance.