



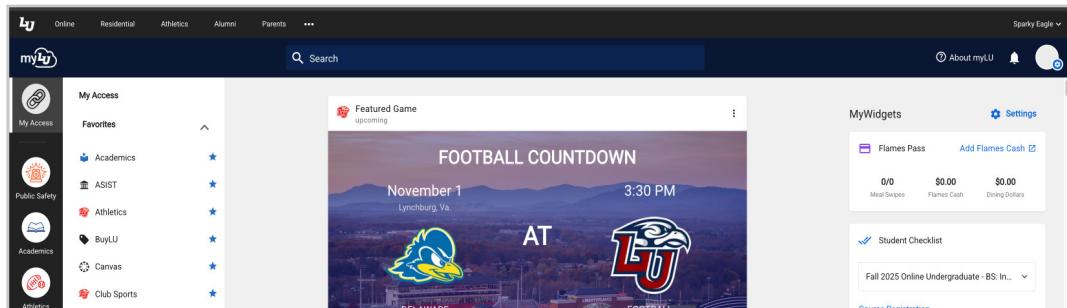
Banner 9 Self-Service

SSB9

This guide provides step-by-step instructions on how to create a new budget transfer document using the **SSB Finance** module.

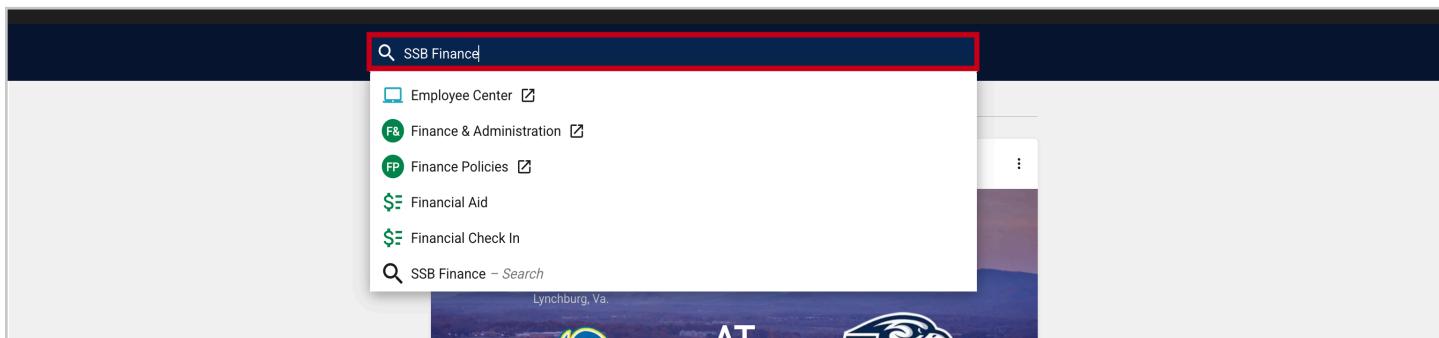
Accessing the Finance Module

1. To access the SSB Finance module, navigate to **myLU.Liberty.edu** and sign in using your Liberty credentials.

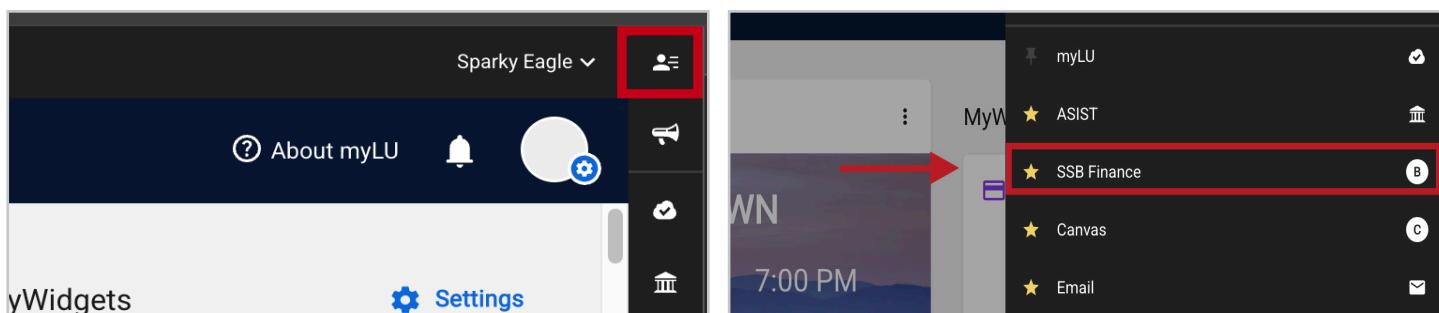


2. You can access the **SSB Finance** module in two ways:

- **Option 1: Use the Search Bar**
 - Locate the search bar at the top of the page
 - Type **SSB Finance**
 - Select the module from the search results

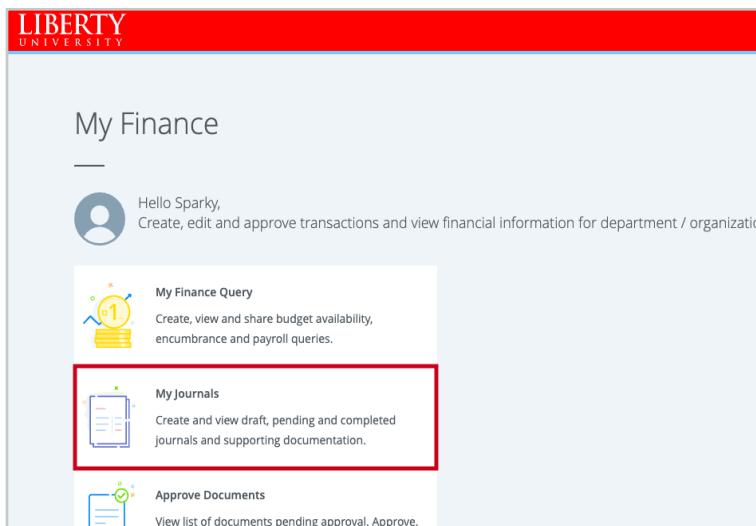


- **Option 2: Use the Global Header**
 - Click the **Global Header** menu
 - Select **SSB Finance** from the list



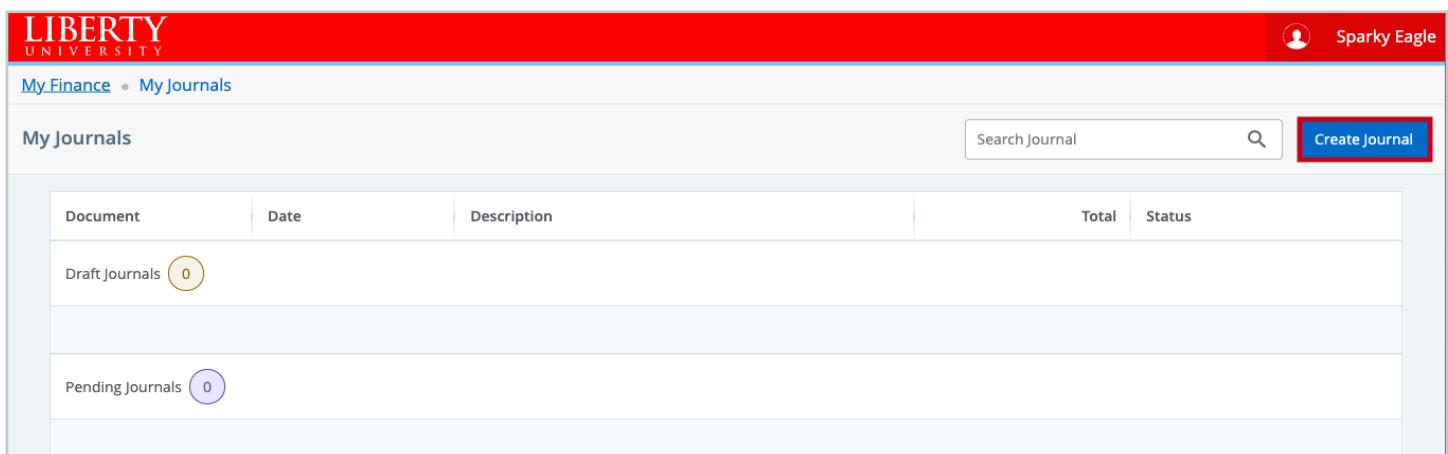
Creating a New Budget Transfer Document

1. In the SSB Finance module, click **My Journals**.



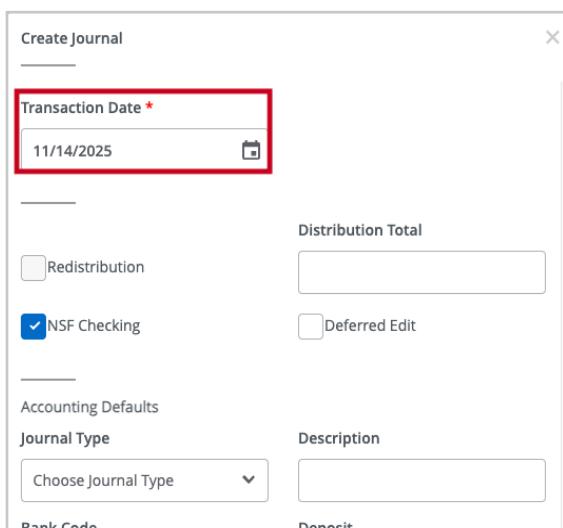
The screenshot shows the SSB Finance module's 'My Finance' dashboard. At the top, there's a greeting 'Hello Sparky, Create, edit and approve transactions and view financial information for department / organization'. Below this, there are three main options: 'My Finance Query' (with a yellow icon of a stack of coins), 'My Journals' (with a blue icon of a document), and 'Approve Documents' (with a green icon of a document with a checkmark). The 'My Journals' option is highlighted with a red box.

2. To create a journal entry, click **Create Journal**.



The screenshot shows the 'My Journals' page. At the top, there's a red header bar with the 'LIBERTY UNIVERSITY' logo and a user profile for 'Sparky Eagle'. Below the header, the page title is 'My Finance > My Journals'. On the right, there's a search bar labeled 'Search Journal' and a blue 'Create Journal' button, which is highlighted with a red box. The main area shows a table with columns: 'Document', 'Date', 'Description', 'Total', and 'Status'. There are two rows: 'Draft Journals' (0) and 'Pending Journals' (0).

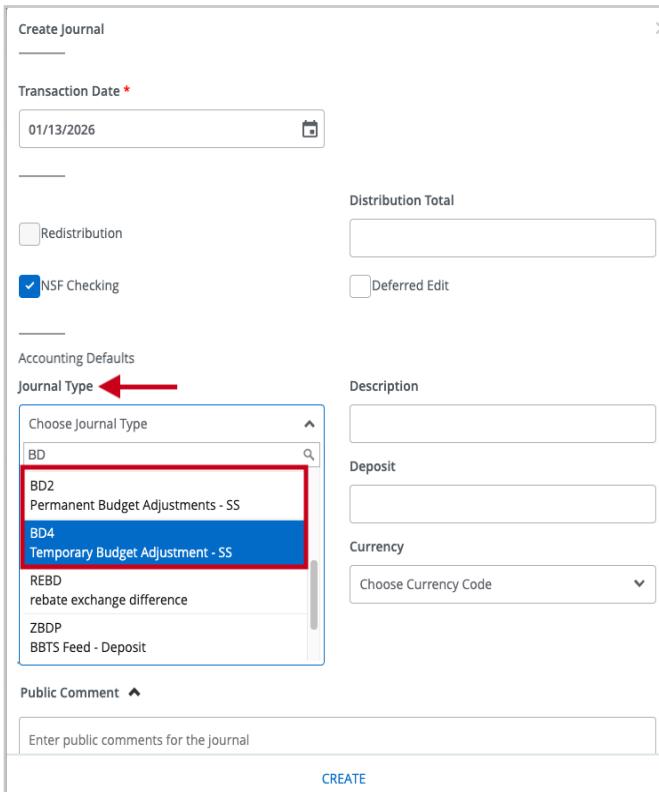
3. The **Create Journal** window will appear where you can set the parameters for your query. The system automatically fills in today's date in the **Transaction Date** field.



The screenshot shows the 'Create Journal' window. The 'Transaction Date *' field is highlighted with a red box and contains the date '11/14/2025'. Other fields include 'Redistribution' (unchecked), 'NSF Checking' (checked), 'Distribution Total' (empty), 'Deferred Edit' (unchecked), 'Accounting Defaults' (empty), 'Journal Type' (dropdown menu 'Choose Journal Type'), 'Description' (empty), 'Bank Code' (empty), and 'Deposit' (empty).

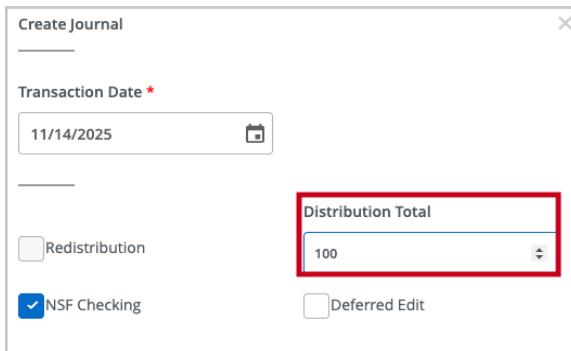
Note: This date serves as the official posting date for your entry and should always correspond to the day of creation.

4. In the **Journal Type** field, type **BD** in the search bar and select either **BD2 Permanent Budget Adjustments** or **BD4 Temporary Budget Adjustment**.



The screenshot shows the 'Create Journal' window. The 'Journal Type' dropdown is open, displaying several options: BD, BD2 Permanent Budget Adjustments - SS, BD4 Temporary Budget Adjustment - SS, REBD rebate exchange difference, and ZBDP BBTS Feed - Deposit. The BD2 option is highlighted with a red box and a red arrow points to the 'Journal Type' label. Other fields visible include 'Transaction Date' (01/13/2026), 'Redistribution' (unchecked), 'NSF Checking' (checked), 'Distribution Total' (empty), 'Deferred Edit' (unchecked), 'Description' (empty), 'Deposit' (empty), 'Currency' (empty), 'Public Comment' (empty), and a 'CREATE' button.

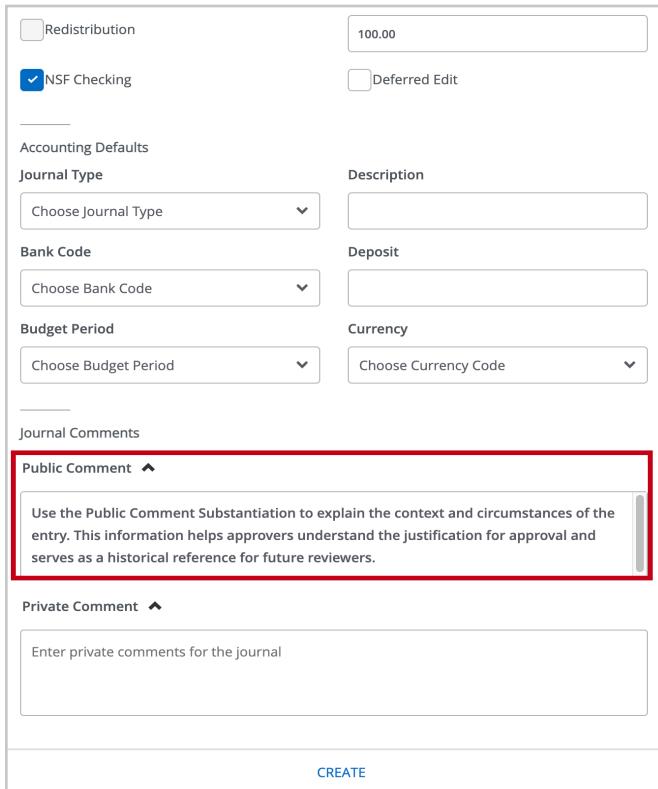
5. In the **Distribution Total** field, enter the total amount for the budget transfer.



The screenshot shows the 'Create Journal' window. The 'Distribution Total' field contains the value '100' and is highlighted with a red box. Other fields visible include 'Transaction Date' (11/14/2025), 'Redistribution' (unchecked), 'NSF Checking' (checked), 'Deferred Edit' (unchecked), and a 'CREATE' button.

Note: Ensure the **Distribution Total** equals the absolute value of all FOAPAL sequence line amounts.

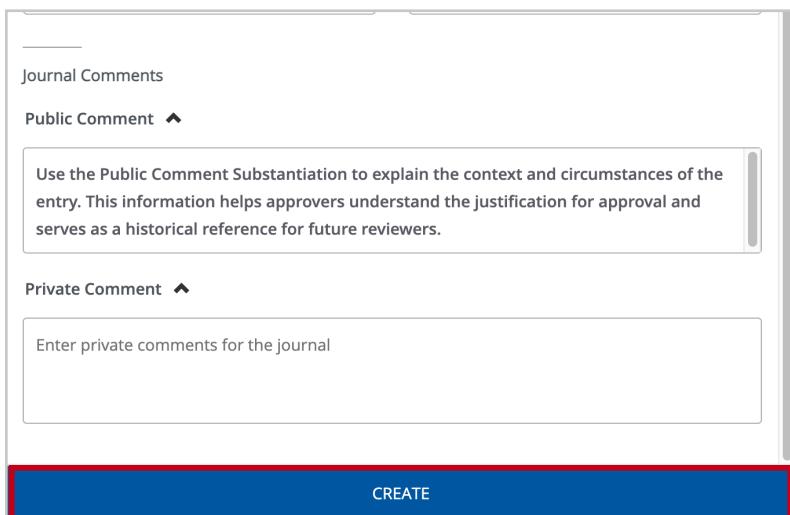
6. Open the **Public Comment** dropdown and enter the justification for the journal, along with any supporting information.



The screenshot shows a form for creating a journal entry. At the top, there are checkboxes for 'Redistribution' (unchecked) and 'NSF Checking' (checked), with a value of '100.00' in a text input field. Below this is a section for 'Accounting Defaults' with dropdowns for 'Journal Type' (labeled 'Choose Journal Type'), 'Bank Code' (labeled 'Choose Bank Code'), and 'Budget Period' (labeled 'Choose Budget Period'). To the right of these dropdowns are fields for 'Description' (labeled 'Deposit'), 'Currency' (labeled 'Choose Currency Code'), and a 'Deferred Edit' checkbox. The 'Journal Comments' section follows, with a 'Public Comment' header and a text area containing the instruction: 'Use the Public Comment Substantiation to explain the context and circumstances of the entry. This information helps approvers understand the justification for approval and serves as a historical reference for future reviewers.' The 'Private Comment' section is below it, with a text area for 'Enter private comments for the journal'. At the bottom is a blue 'CREATE' button.

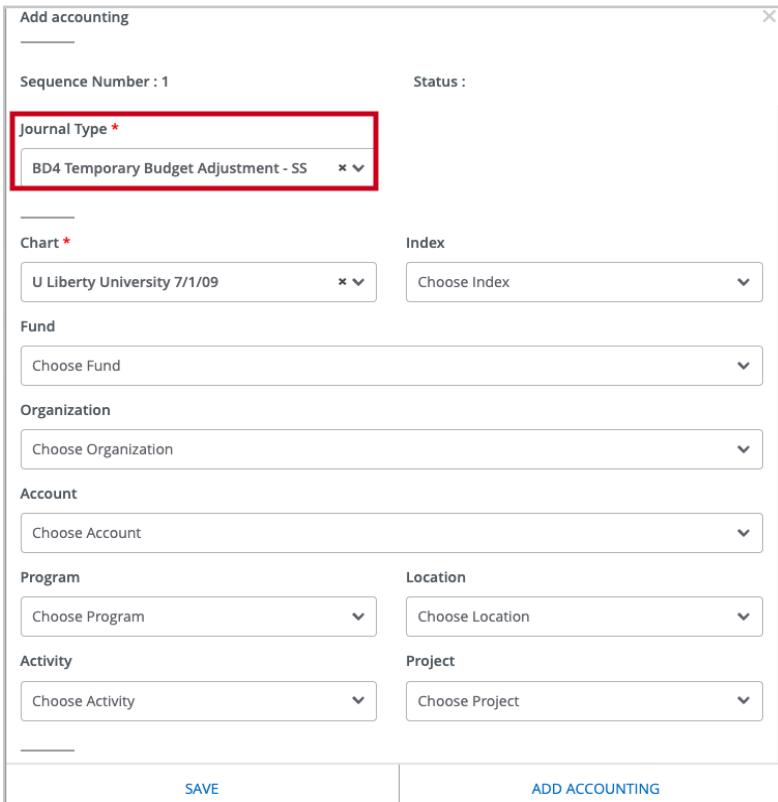
Note: Use the Public Comment Substantiation to explain the context and circumstances of the entry. This information helps approvers understand the justification for approval and serves as a historical reference for future reviewers.

7. Click **CREATE**.



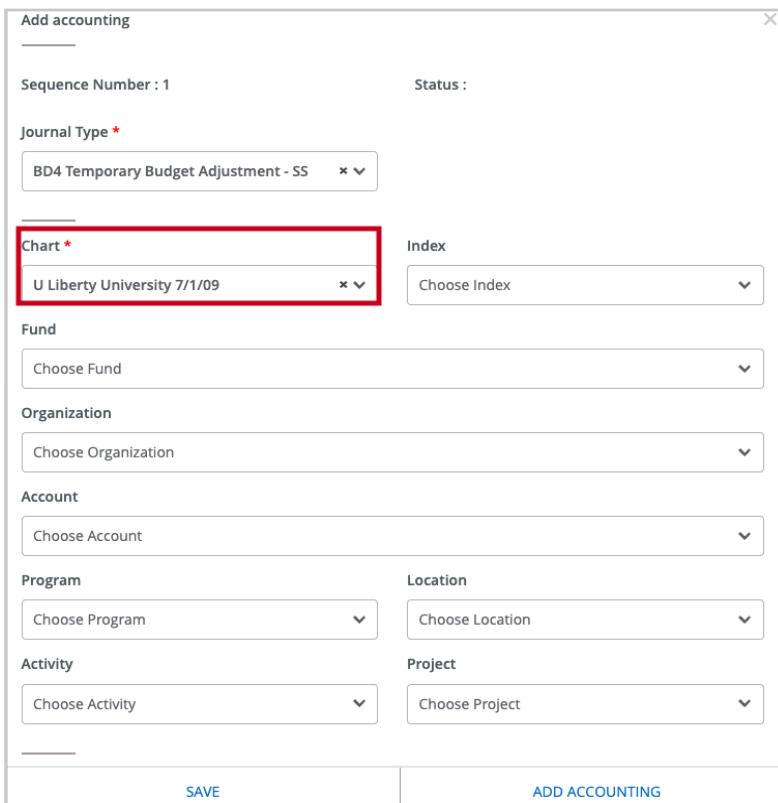
The screenshot shows the same journal entry creation form as the previous one, but with the 'CREATE' button highlighted by a red box. The 'Public Comment' section and its instructions are also visible.

8. The **Add Accounting** window will open. If the Journal Type does not auto-populate, choose either **BD2** or **BD4**.



The screenshot shows the 'Add accounting' window. The 'Journal Type' field is highlighted with a red box and contains the value 'BD4 Temporary Budget Adjustment - SS'. Other fields include 'Status' (empty), 'Chart' (U Liberty University 7/1/09), 'Index' (Choose Index), 'Fund' (Choose Fund), 'Organization' (Choose Organization), 'Account' (Choose Account), 'Program' (Choose Program), 'Location' (Choose Location), 'Activity' (Choose Activity), and 'Project' (Choose Project). At the bottom are 'SAVE' and 'ADD ACCOUNTING' buttons.

9. Select an option from the **Chart** dropdown menu.



The screenshot shows the 'Add accounting' window. The 'Chart' field is highlighted with a red box and contains the value 'U Liberty University 7/1/09'. Other fields are identical to the previous screenshot. At the bottom are 'SAVE' and 'ADD ACCOUNTING' buttons.

Note: The default selection is U Liberty 7/1/09.

10. Enter your department's **FOAPAL** elements: **Fund**, **Org**, **Account**, and **Program** are the four required fields. Include the **Activity Code** and **Location** as necessary.

Status :

Journal Type *

BD4 Temporary B... x v

Chart *

U Liberty Univers... x v Index Choose Index v

Fund 

111101 Resident Undergraduate Non-Payroll x v

Organization 

B4030 JFL Technology x v

Account 

732001 Office Supplies x v

Program  Location

60 Institutional S... x v Choose Location v

Activity Project

Choose Activity v Choose Project v

11. Enter the dollar amount for the transfer in the **Amount** field.

Status :

Amount *  Debit/Credit *

100.00 None v

Document Reference

NSF Override

Description *  Budget Period

07 x v

Bank

Choose Bank Code v Accrual Indicator

Deposit  Currency

Choose Currency Co... v

12. To increase the amount for the account code, select **+ Plus**. To decrease the amount, select **- Minus** from the **Debit/Credit** dropdown menu.

The screenshot shows a form for creating a budget transfer document. On the right, a dropdown menu for 'Debit/Credit' is open, with the option '+ Plus' highlighted in blue and surrounded by a red box. Other options in the list include 'None', 'Debit', 'Credit', and '- Minus'. The rest of the form includes fields for 'Amount' (50.00), 'Description' (empty), 'Bank' (Choose Bank Code), and checkboxes for 'NSF Override' and 'Accrual Indicator'.

13. Enter a description in the **Description** field.

The screenshot shows the same form as above, but the 'Description' field now contains the text 'Test', which is highlighted with a red box. The rest of the form remains the same.

Note: Enter a precise description, as it will be permanently recorded in the Banner ledger.

14. Select a month from the **Budget Period** dropdown, and then **SAVE** to add the FOAPAL sequence line.

The screenshot shows the form with the 'Description' field containing 'Test'. On the right, a dropdown menu for 'Budget Period' is open, with the option '05' highlighted in blue and surrounded by a red box. Other options in the list include '01', '02', '03', '04', '06', and '07'. The rest of the form includes fields for 'NSF Override', 'Bank' (Choose Bank Code), 'Deposit', 'Encumbrance', 'Encumbrance Number' (Choose Encumbrance Docu...), 'Action' (Choose Action), 'Item Number' (empty), 'Sequence' (empty), 'Commit Type' (Choose Commit Type), and buttons for 'SAVE' and 'ADD ACCOUNTING'.

Note: The Budget Period must match the same month of the Transaction Date. Each number corresponds to the number of months since the start of the fiscal year (e.g., July = 1, August = 2, etc).

15. To add additional FOAPAL sequence lines to the entry, click **ADD ACCOUNTING** and repeat steps 7-13 for all necessary FOAPAL sequence lines.

Bank

Choose Bank Code Accrual Indicator

Deposit

Encumbrance

Encumbrance Number

Action

Item Number

Sequence

Commit Type

Endowment

Gift Date

Number of Units

SAVE **ADD ACCOUNTING**

16. To edit a sequence, click on the **sequence**, make the necessary changes, and click **SAVE**.

LIBERTY UNIVERSITY

Sparky Eagle

My Finance • My.Journals • J0182339

J0182339

Transaction date :01/12/2026 Total :100.00 Status : **Draft**

Accounting Distribution **1**

Sequence	Status	Type	Chart	Percent	Amount	Debit/Credit	Index
<input type="checkbox"/> 1	Draft	BD4	U	--	50.00	+ Plus	--

Accounting total : 50.00 **Add accounting**

Item Number

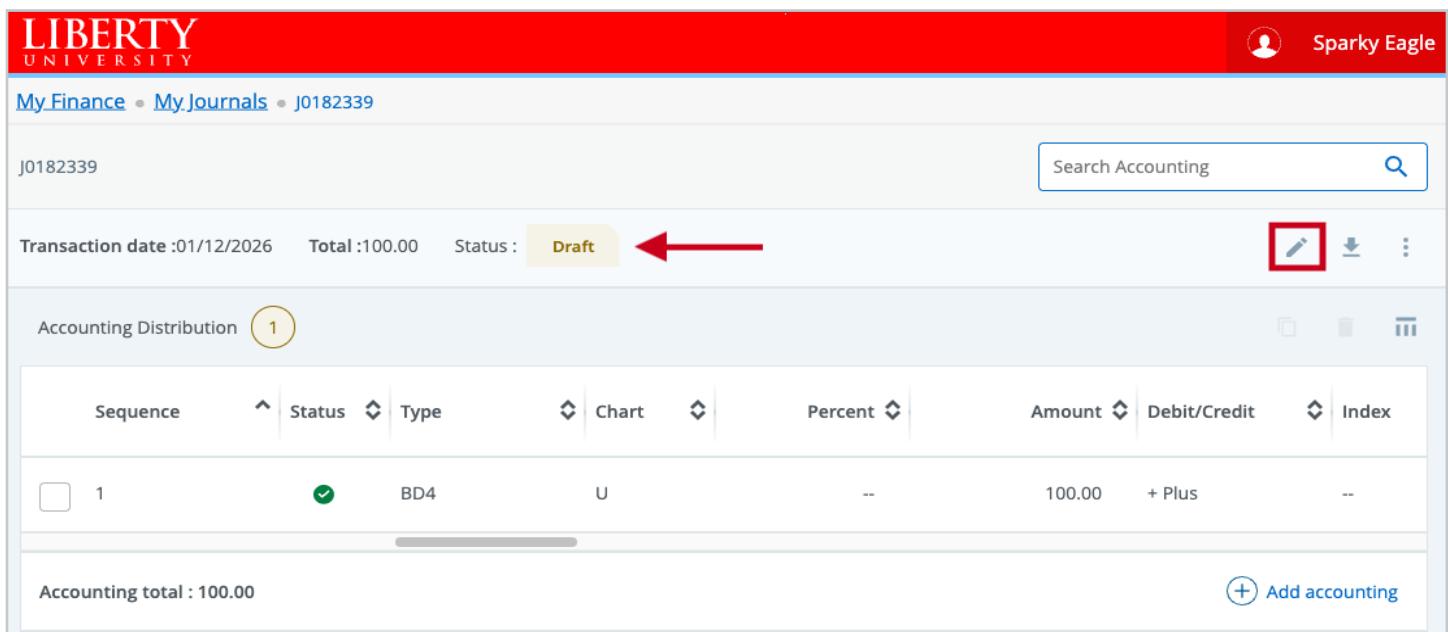
Sequence

Commit Type

Endowment

SAVE **ADD ACCOUNTING**

17. To make edits to the journal, click the **pencil icon**.



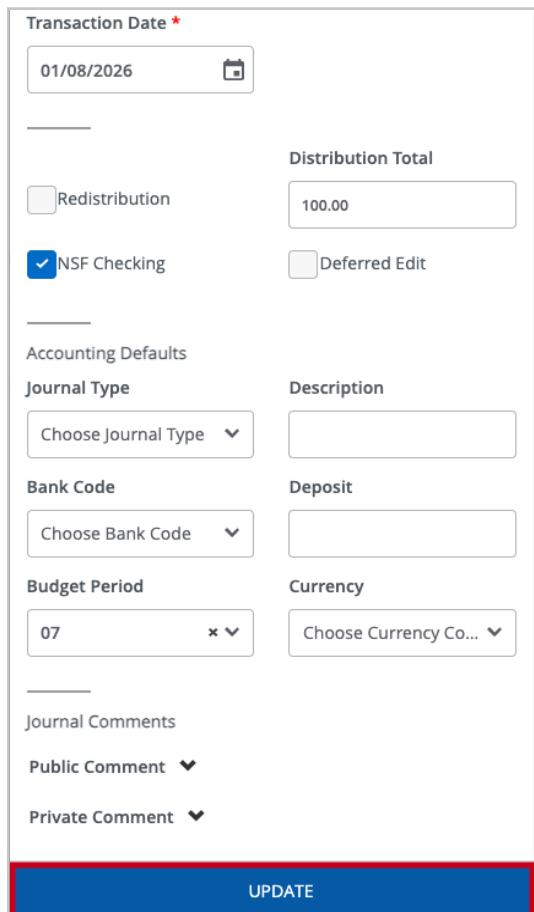
The screenshot shows the Liberty University My Finance My.Journals interface. A journal entry with ID J0182339 is displayed. The status is 'Draft', indicated by a yellow box with the word 'Draft' and a red arrow pointing to it. The journal entry details are as follows:

Sequence	Status	Type	Chart	Percent	Amount	Debit/Credit	Index
1	✓	BD4	U	--	100.00	+ Plus	--

Accounting total : 100.00 [+ Add accounting](#)

Note: You can only make edits to the entry in Draft status.

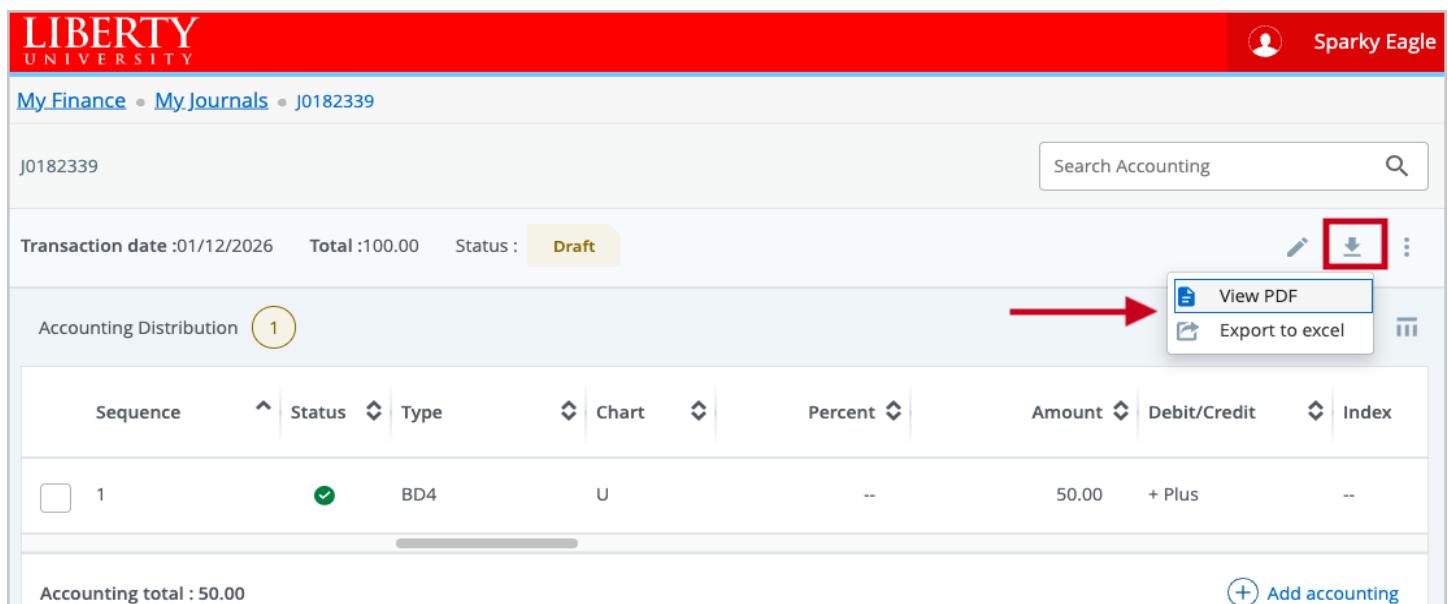
18. Make the necessary changes and click **UPDATE**.



The screenshot shows the journal edit form. The fields are as follows:

- Transaction Date ***: 01/08/2026
- Distribution Total**: 100.00
- Redistribution**:
- NSF Checking**:
- Deferred Edit**:
- Accounting Defaults**
- Journal Type**: Choose Journal Type
- Description**: (empty text area)
- Bank Code**: Choose Bank Code
- Deposit**: (empty text area)
- Budget Period**: 07
- Currency**: Choose Currency Co...
- Journal Comments**
- Public Comment**: (dropdown menu)
- Private Comment**: (dropdown menu)
- UPDATE** button (highlighted with a red box)

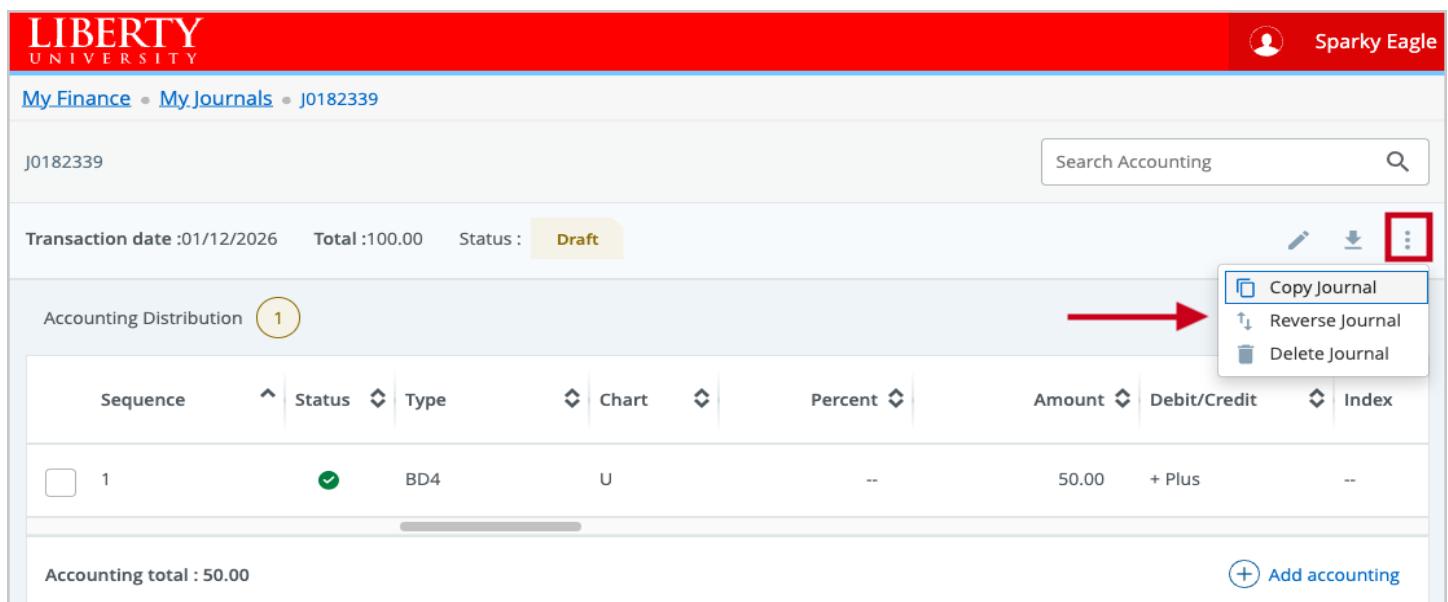
19. To download the journal, click the **download icon** to view the document in either PDF or Excel format.



The screenshot shows a journal entry for transaction date 01/12/2026, total 100.00, and status Draft. The accounting distribution table has one row with sequence 1, type BD4, chart U, amount 50.00, and debit/credit + Plus. A red arrow points to the 'View PDF' button in the top right corner of the journal entry screen.

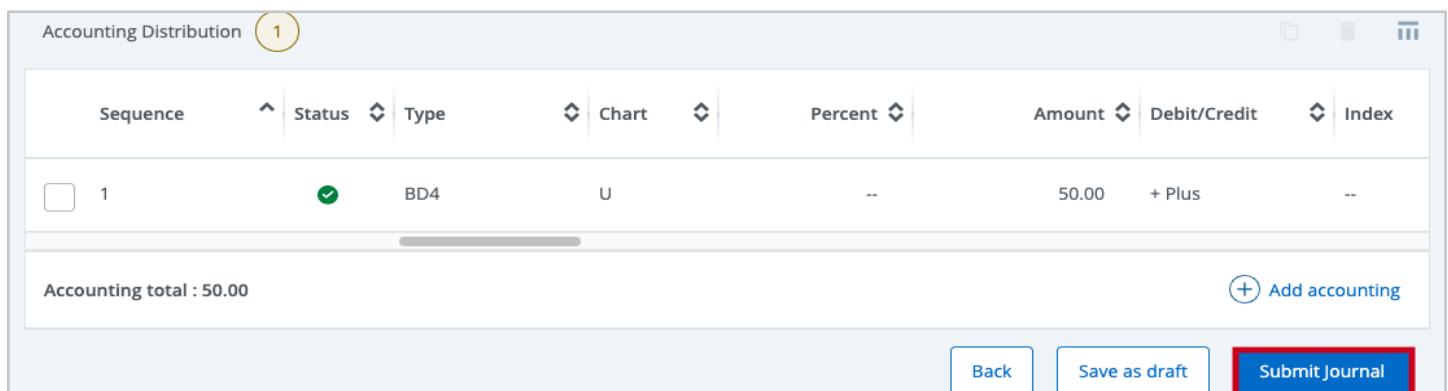
Note: Selecting View PDF will open the document PDF in a new tab. Selecting Export to excel will save the file to your computer.

20. The **three-dot menu** allows you to **Copy**, **Reverse**, or **Delete** the journal entry.



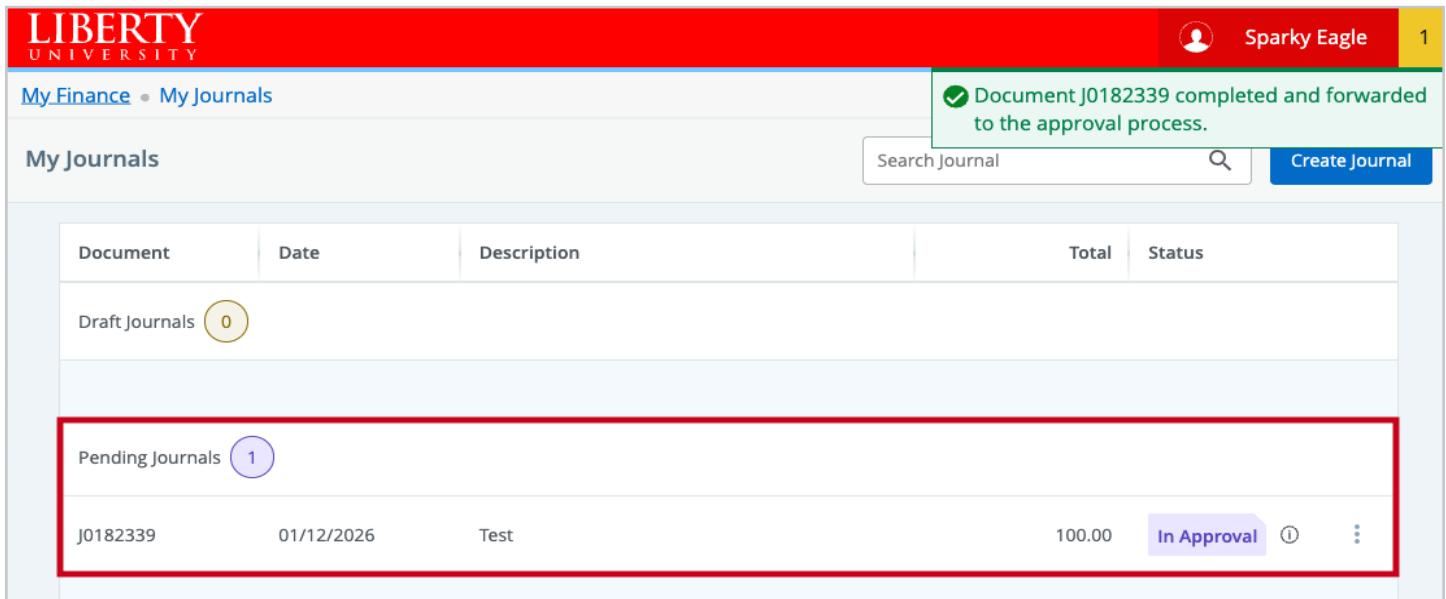
The screenshot shows the same journal entry as above. A red arrow points to the three-dot menu icon in the top right corner, which has options for Copy Journal, Reverse Journal, and Delete Journal. The 'Copy Journal' option is highlighted.

21. Click **Submit Journal** to move the document to the next approval process step.



The screenshot shows the journal entry with the 'Submit Journal' button highlighted in red at the bottom right. Other buttons visible are 'Back', 'Save as draft', and 'Submit Journal'.

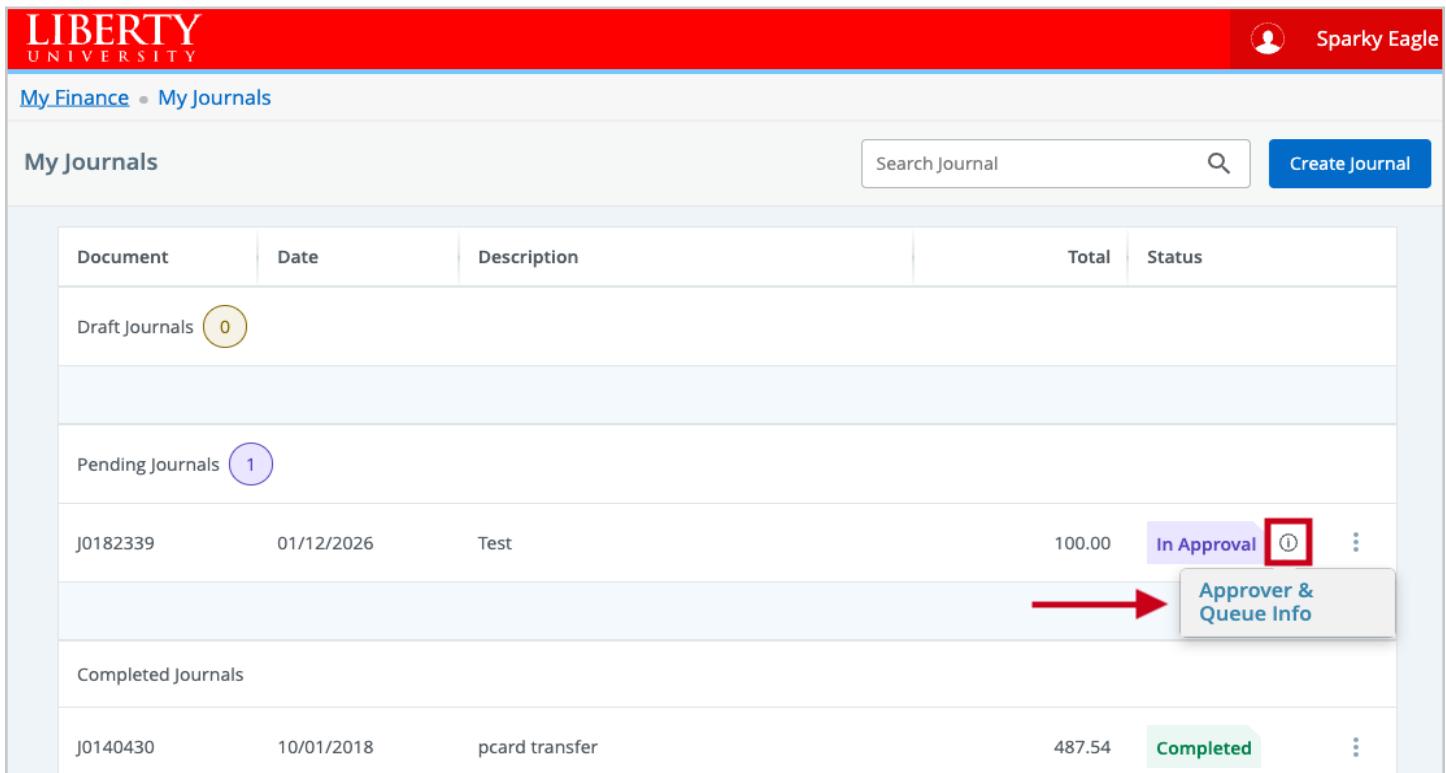
22. The journal submission will go into **Pending Journal** status awaiting approval.



The screenshot shows the Liberty University My Journals page. At the top, there is a red header with the Liberty University logo and a user profile for "Sparky Eagle". A green notification box in the top right corner says "Document J0182339 completed and forwarded to the approval process." Below the header, the page title "My Journals" is displayed, along with a search bar and a "Create Journal" button. The main content area is a table with columns: Document, Date, Description, Total, and Status. The table shows two rows: "Draft Journals" (0 entries) and "Pending Journals" (1 entry). The pending journal entry is highlighted with a red box. It shows the document number "J0182339", date "01/12/2026", description "Test", total "100.00", status "In Approval", and an info icon (i). There is also a three-dot menu icon.

Document	Date	Description	Total	Status
Draft Journals	0			
Pending Journals	1			
J0182339	01/12/2026	Test	100.00	In Approval

23. Select the **In Approval** information icon to view the approval hierarchy.

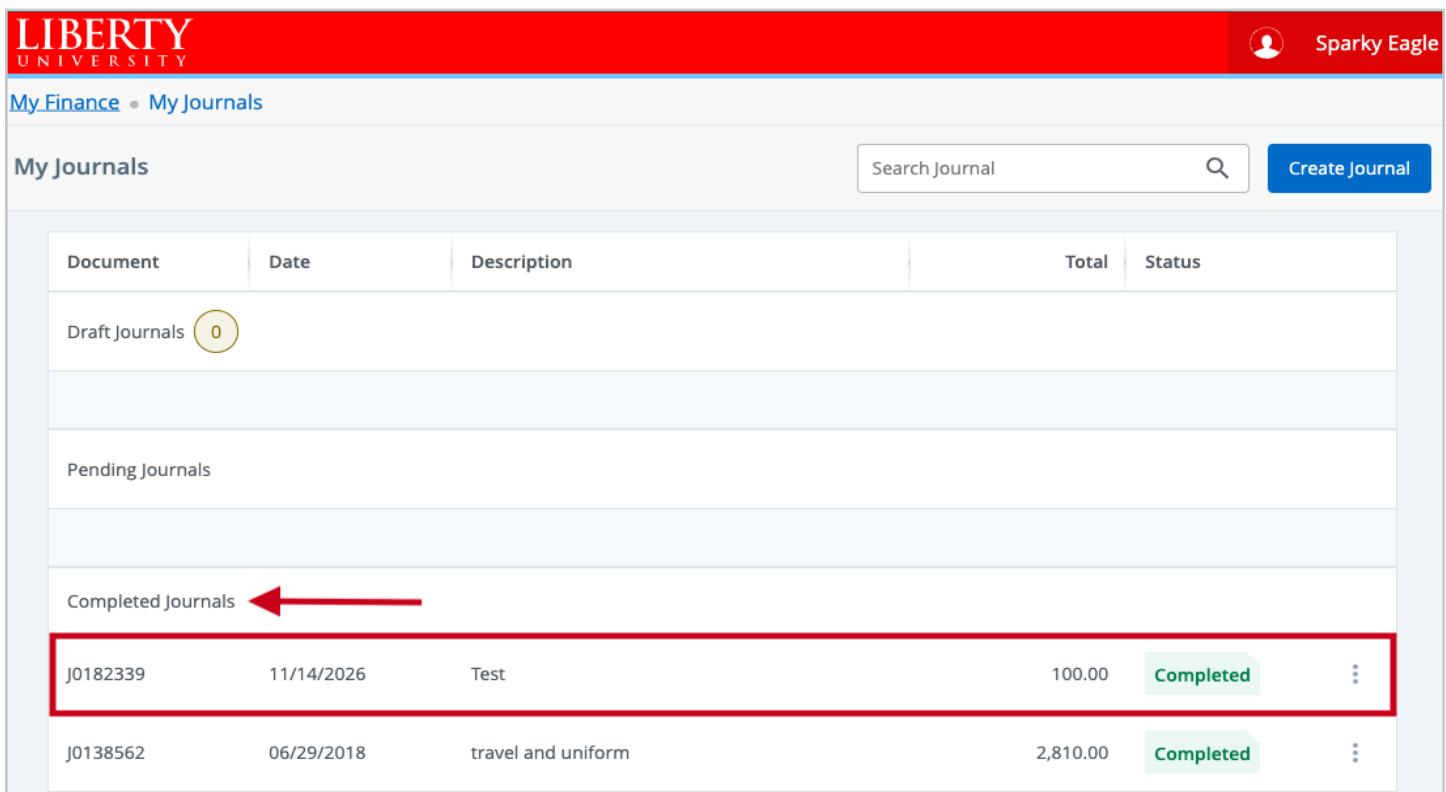


The screenshot shows the Liberty University My Journals page, similar to the previous one but with a different pending journal entry. The pending journal entry for "J0182339" is highlighted with a red box and a red arrow points to a callout box labeled "Approver & Queue Info". The callout box contains an info icon (i) and a red box around it. The table structure is the same as the previous screenshot, with columns: Document, Date, Description, Total, and Status. The pending journal entry shows the document number "J0182339", date "01/12/2026", description "Test", total "100.00", status "In Approval", and an info icon (i). There is also a three-dot menu icon.

Document	Date	Description	Total	Status
Draft Journals	0			
Pending Journals	1			
J0182339	01/12/2026	Test	100.00	In Approval
Completed Journals				
J0140430	10/01/2018	pcard transfer	487.54	Completed

Note: SSB9 will not send an email notification. You must inform all approvers that the entry is available to review and approve.

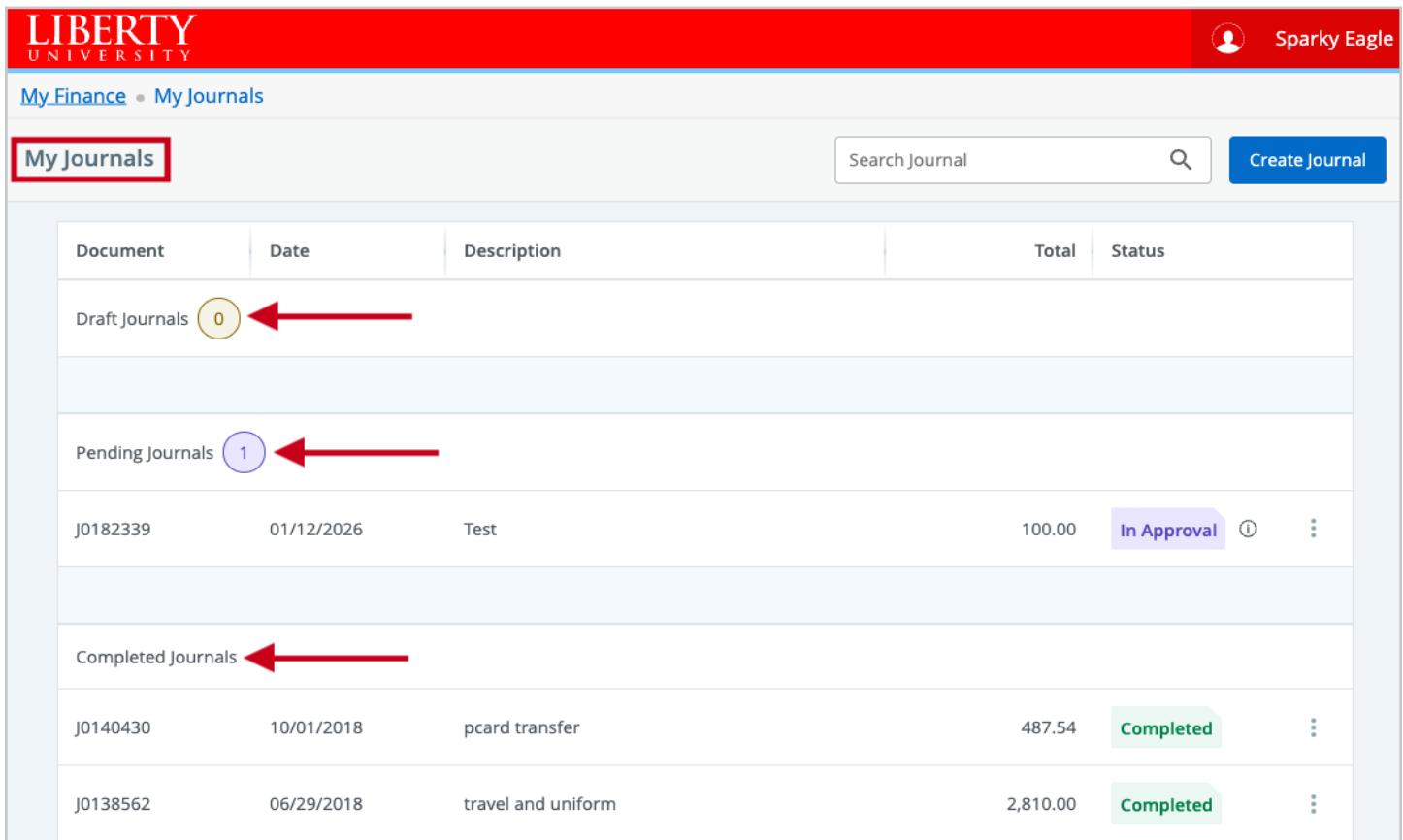
24. Once the journal is approved, it will move to the **Completed Journals** status.



The screenshot shows the 'My Journals' dashboard. At the top, there is a red header with the 'LIBERTY UNIVERSITY' logo and a user profile for 'Sparky Eagle'. Below the header, a navigation bar shows 'My Finance' and 'My Journals'. The main area is titled 'My Journals' and contains a table with columns: Document, Date, Description, Total, and Status. The table has three rows: 'Draft Journals' (0), 'Pending Journals', and 'Completed Journals'. The 'Completed Journals' row is highlighted with a red box and has a red arrow pointing to it from the left. The row contains two entries: 'J0182339' (11/14/2026, Test, 100.00, Completed) and 'J0138562' (06/29/2018, travel and uniform, 2,810.00, Completed).

Document	Date	Description	Total	Status
Draft Journals	0			
Pending Journals				
Completed Journals				
J0182339	11/14/2026	Test	100.00	Completed
J0138562	06/29/2018	travel and uniform	2,810.00	Completed

25. The **My Journals** dashboard shows all **Draft, Pending, and Completed Journals**.

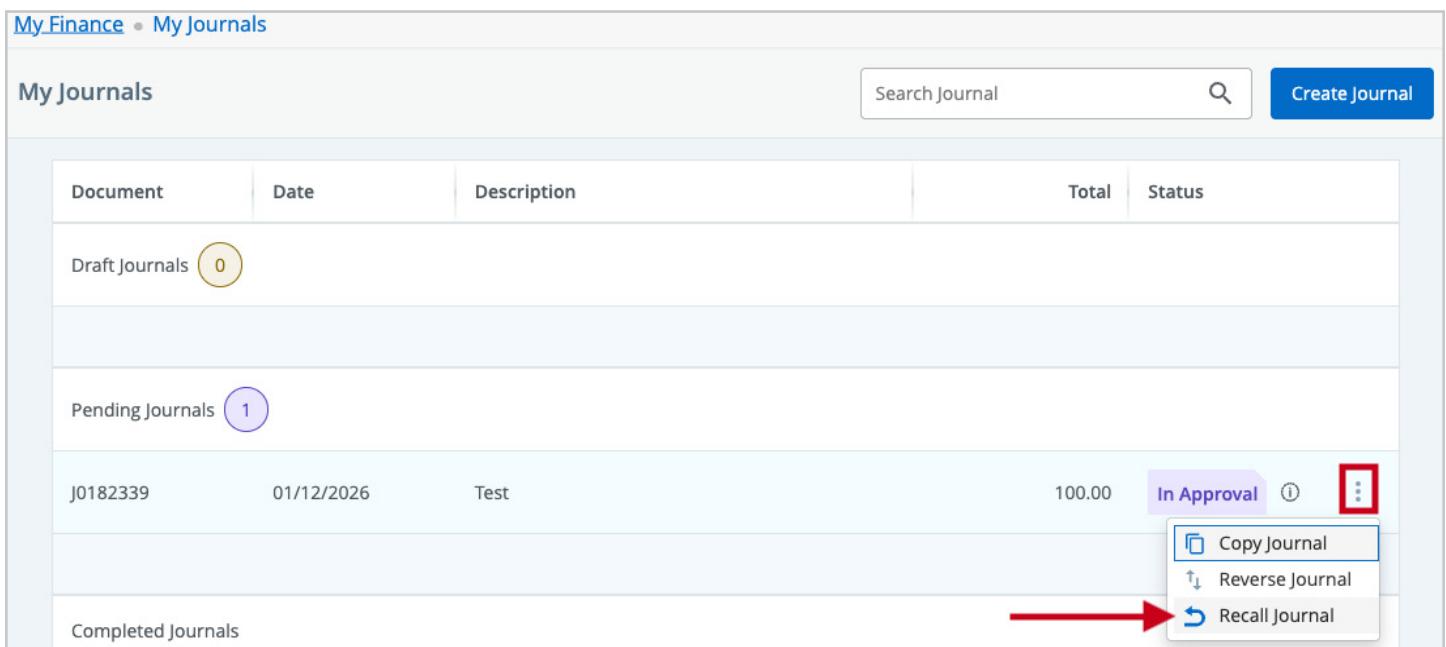


The screenshot shows the 'My Journals' dashboard. At the top, there is a red header with the 'LIBERTY UNIVERSITY' logo and a user profile for 'Sparky Eagle'. Below the header, a navigation bar shows 'My Finance' and 'My Journals'. The main area is titled 'My Journals' and contains a table with columns: Document, Date, Description, Total, and Status. The table has four rows: 'Draft Journals' (0), 'Pending Journals' (1), and two 'Completed Journals' entries. The 'Pending Journals' row is highlighted with a blue circle and has a red arrow pointing to it from the left. The 'Completed Journals' rows have red arrows pointing to them from the left. The table contains the following data:

Document	Date	Description	Total	Status
Draft Journals	0			
Pending Journals	1			
J0182339	01/12/2026	Test	100.00	In Approval
Completed Journals				
J0140430	10/01/2018	pcard transfer	487.54	Completed
J0138562	06/29/2018	travel and uniform	2,810.00	Completed

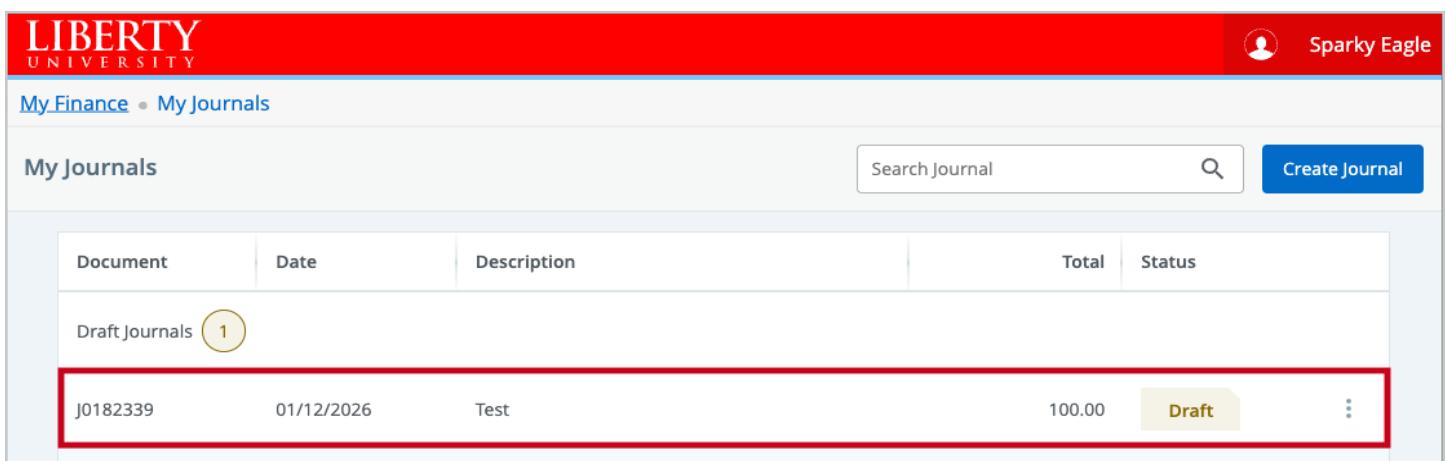
Note: Once a journal is in Approval, changes can no longer be made. You can recall the journal to make corrections or additional edits.

26. To recall a journal, click the **three-dot menu** to the right of the journal title and select **Recall Journal**.



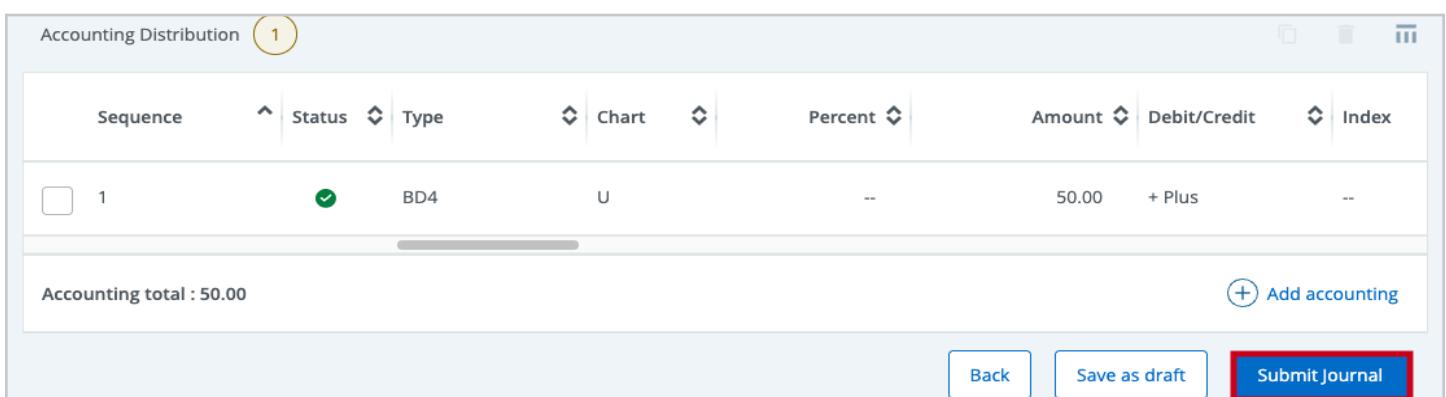
The screenshot shows the 'My Journals' page with a table of journals. The columns are Document, Date, Description, Total, and Status. There are three rows: 'Draft Journals' (0), 'Pending Journals' (1), and 'Completed Journals'. The 'Pending Journals' row is highlighted with a blue circle containing the number 1. A red arrow points to the three-dot menu (three vertical dots) next to the journal entry 'J0182339' in the 'Completed Journals' row. A context menu is open, showing options: 'Copy Journal', 'Reverse Journal', and 'Recall Journal'. The 'Recall Journal' option is highlighted with a red box.

27. This will set the journal back to **Draft** status.



The screenshot shows the 'My Journals' page after recalling the journal. The 'Completed Journals' row is now highlighted with a red box. The journal entry 'J0182339' is shown with a status of 'Draft' (highlighted with a red box) instead of 'In Approval'. The three-dot menu is no longer visible.

28. Make all edits and click **Submit Journal** to continue the review and approval process.



The screenshot shows the 'Accounting Distribution' page for the journal entry. The table has columns: Sequence, Status, Type, Chart, Percent, Amount, Debit/Credit, and Index. One row is visible with values: Sequence 1, Status BD4, Type U, Percent --, Amount 50.00, Debit/Credit + Plus, and Index --. Below the table, it says 'Accounting total : 50.00'. At the bottom are buttons: 'Back', 'Save as draft' (highlighted with a red box), and 'Submit Journal' (highlighted with a red box).

Need Assistance?

For more information on SSB9, visit Liberty.edu/SSB9.