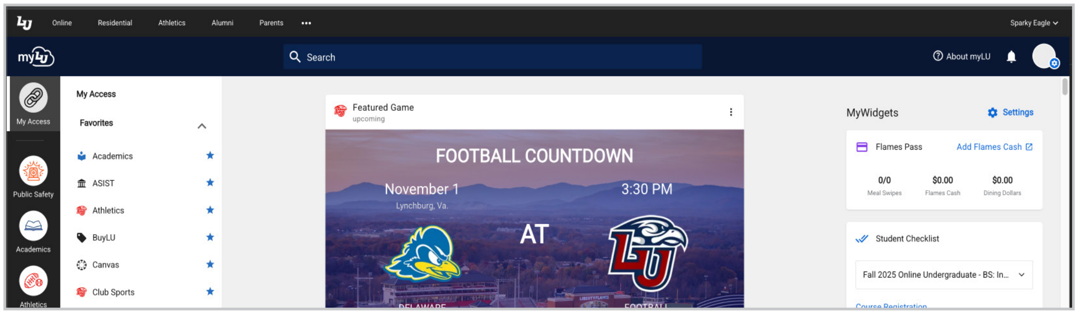
Banner 9 Self-Service

SSB9

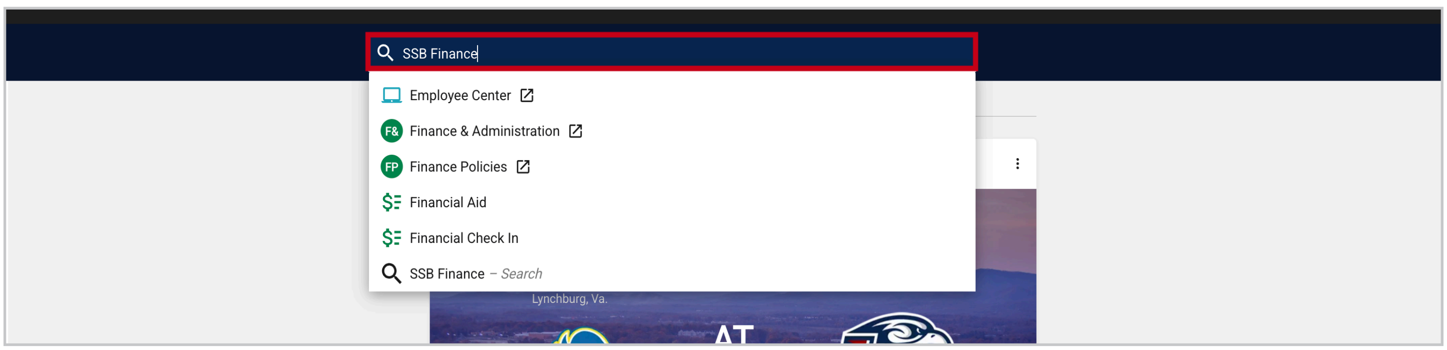
This guide provides step-by-step instructions on how to create a new budget transfer document using the **SSB Finance** module.

Accessing the Finance Module

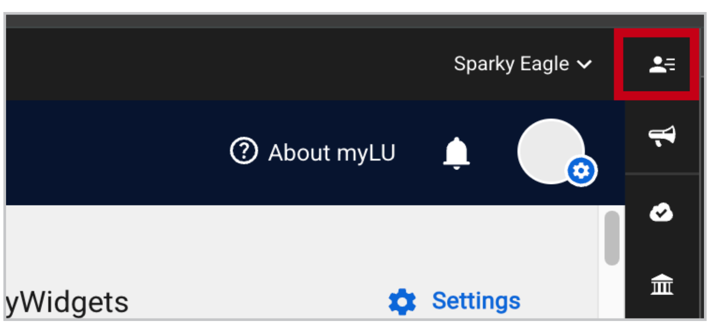
1. To access the SSB Finance module, navigate to **myLU.Liberty.edu** and sign in using your Liberty credentials.

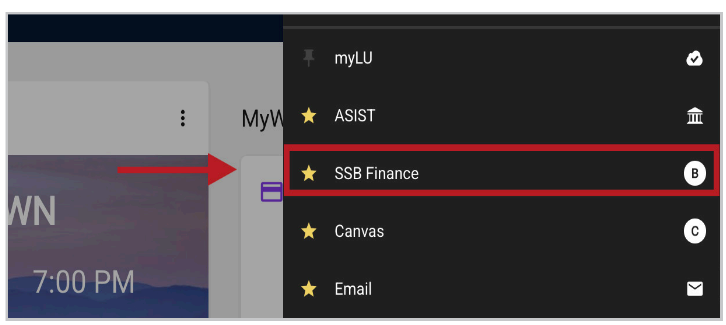


2. You can access the **SSB Finance** module in two ways:
   - **Option 1: Use the Search Bar**
     - Locate the search bar at the top of the page
     - Type **SSB Finance**
     - Select the module from the search results

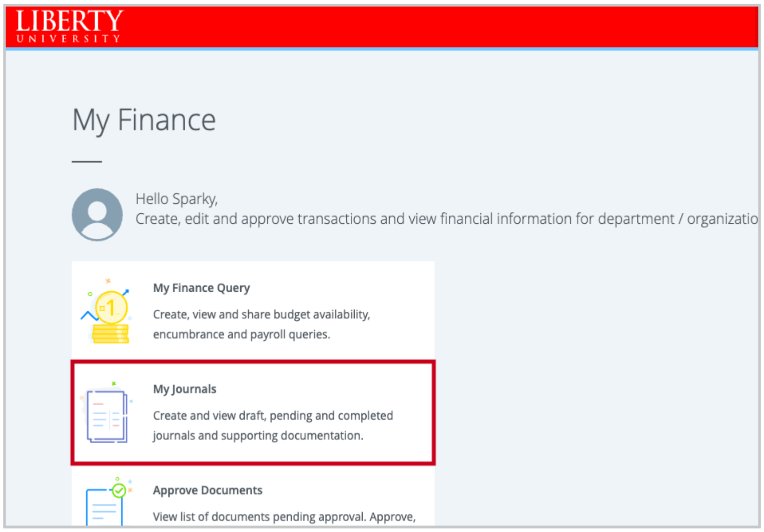


   - **Option 2: Use the Global Header**
     - Click the **Global Header** menu
     - Select **SSB Finance** from the list

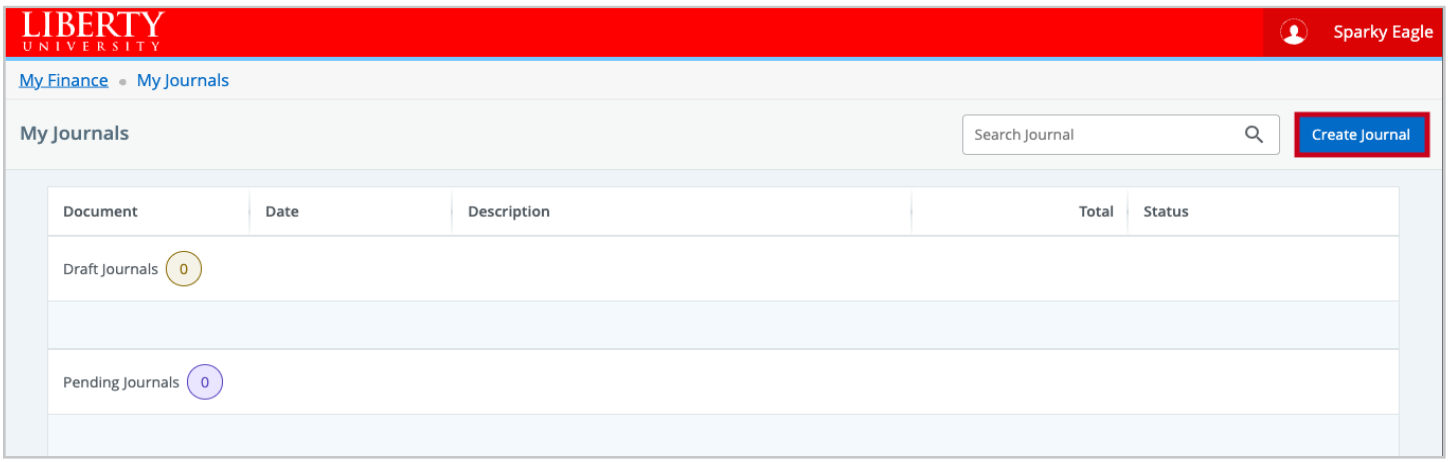




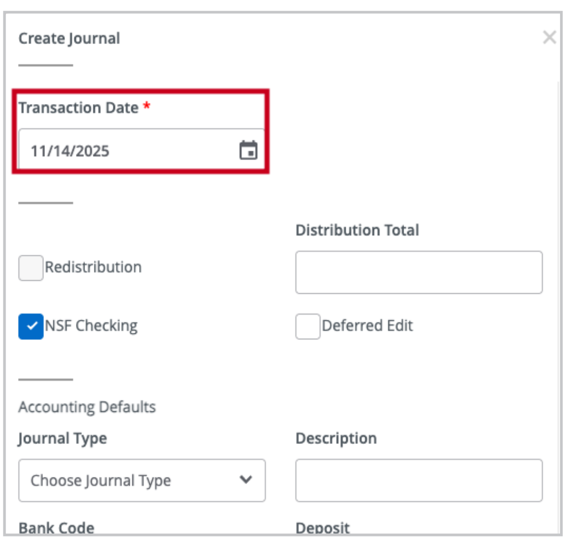
1. In the SSB Finance module, click **My Journals**.



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

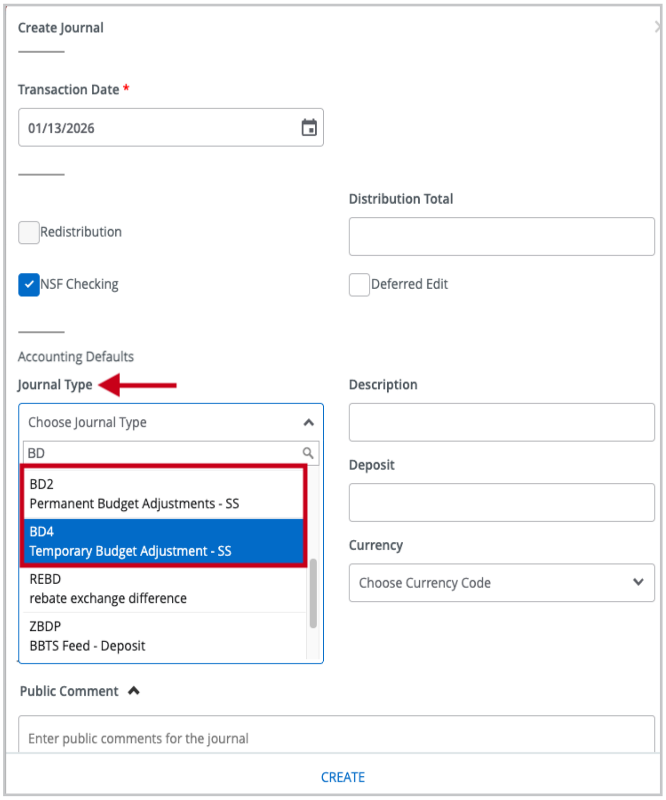


3. The **Create Journal** window will appear where you can set the parameters for your query. The system automatically fills in today's date in the **Transaction Date** field.

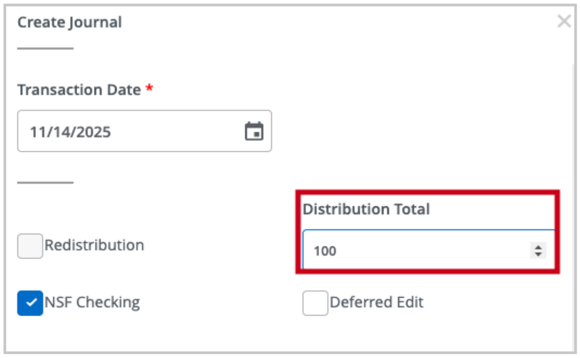


Note: This date serves as the official posting date for your entry and should always correspond to the day of creation.

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

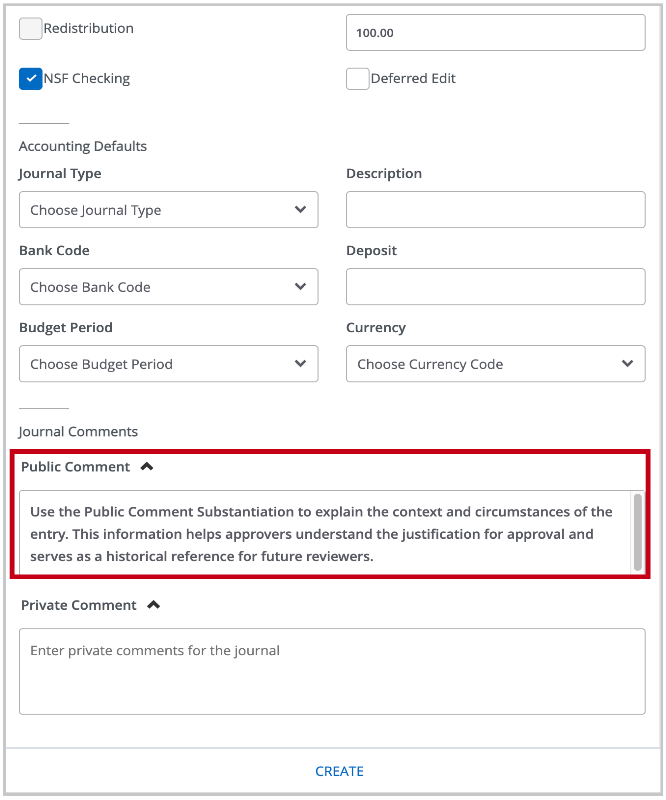


5. In the **Distribution Total** field, enter the total amount for the budget transfer.



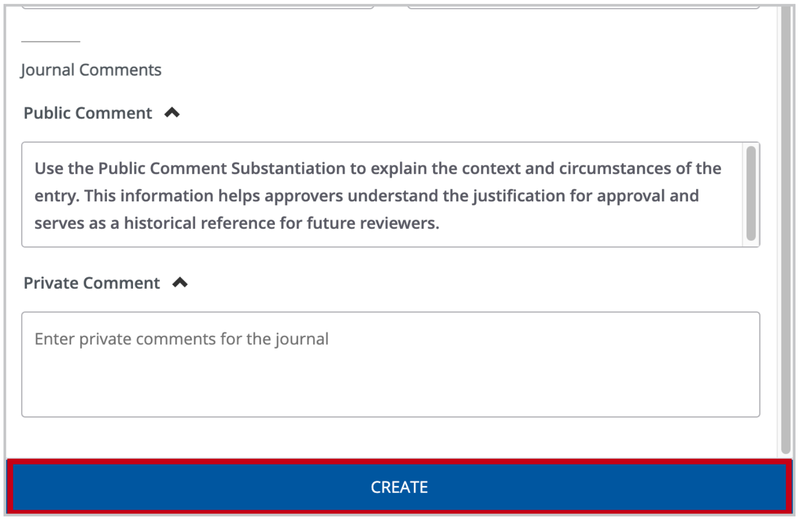
Note: Ensure the Distribution Total equals the absolute value of all FOAPAL sequence line amounts.

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

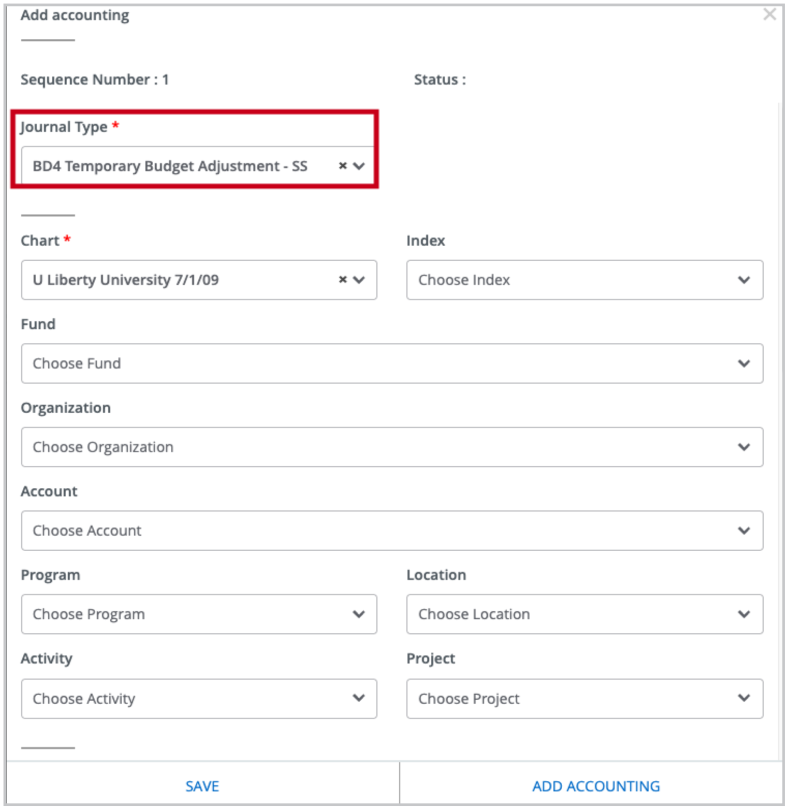


Note: Use the Public Comment Substantiation to explain the context and circumstances of the entry. This information helps approvers understand the justification for approval and serves as a historical reference for future reviewers.

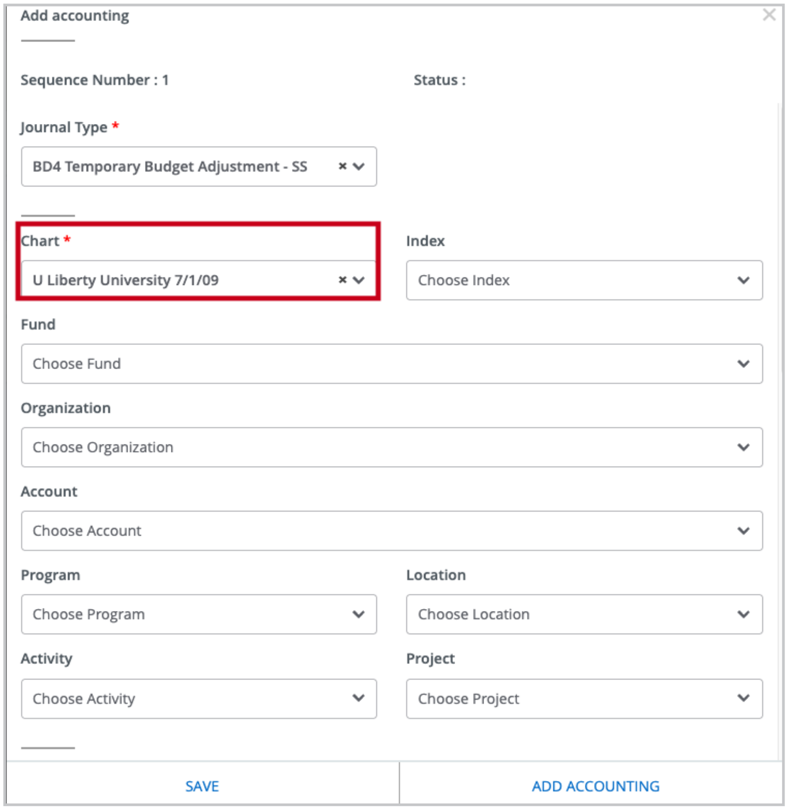
7. Click **CREATE**.



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

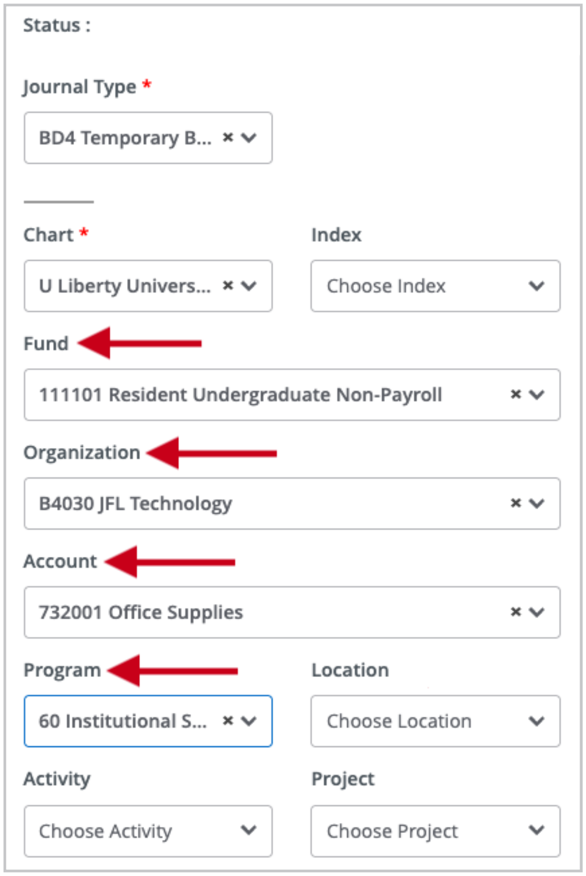


9. Select an option from the **Chart** dropdown menu.

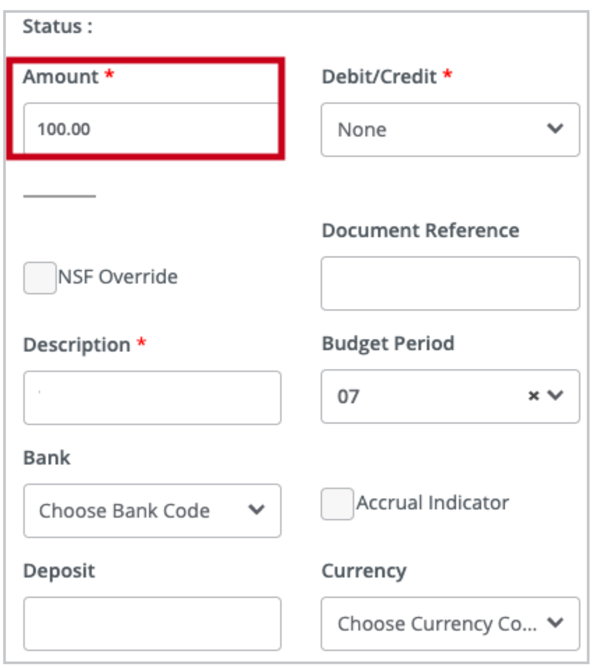


Note: The default selection is U Liberty 7/1/09.

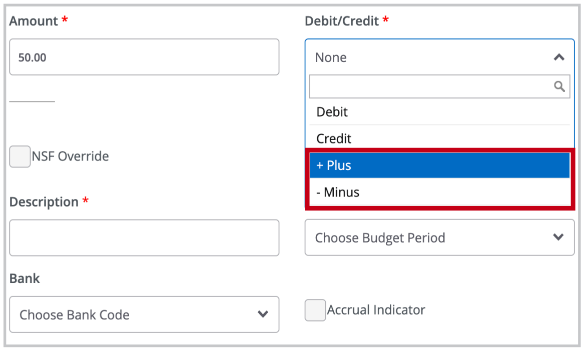
10. Enter your department's **FOAPAL** elements**: Fund**, **Org**, **Account**, and **Program** are the four required fields. Include the **Activity Code** and **Location** as necessary.



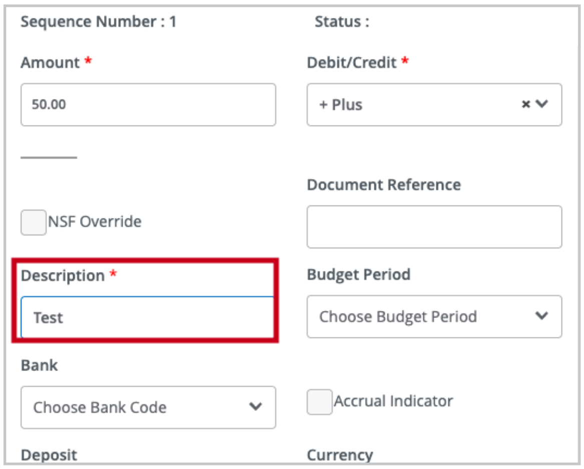
11. Enter the dollar amount for the transfer in the **Amount** field.



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

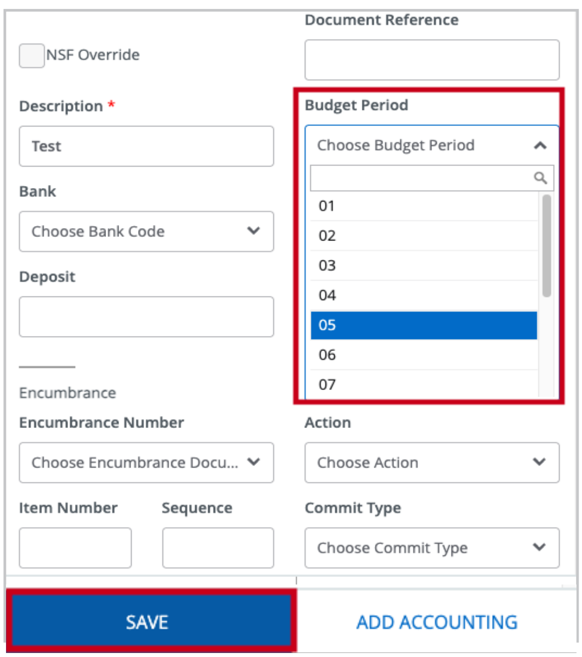


13. Enter a description in the **Description** field.



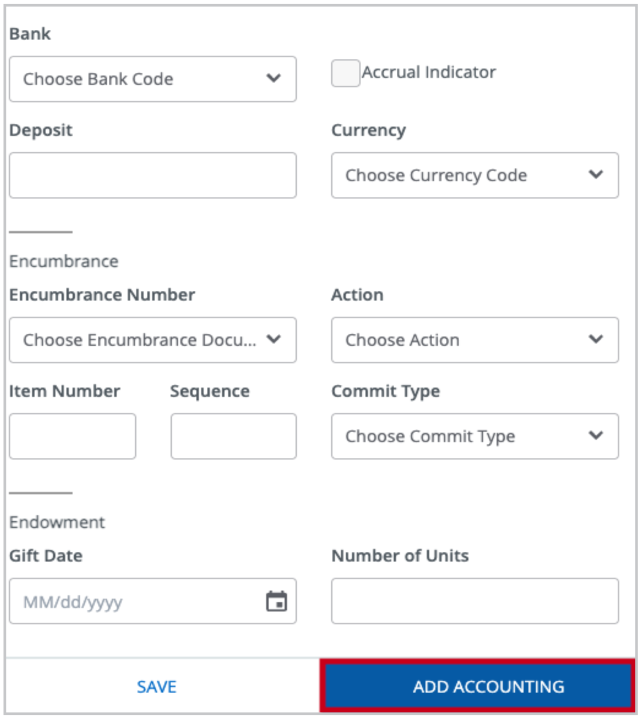
Note: Enter a precise description, as it will be permanently recorded in the Banner ledger.

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

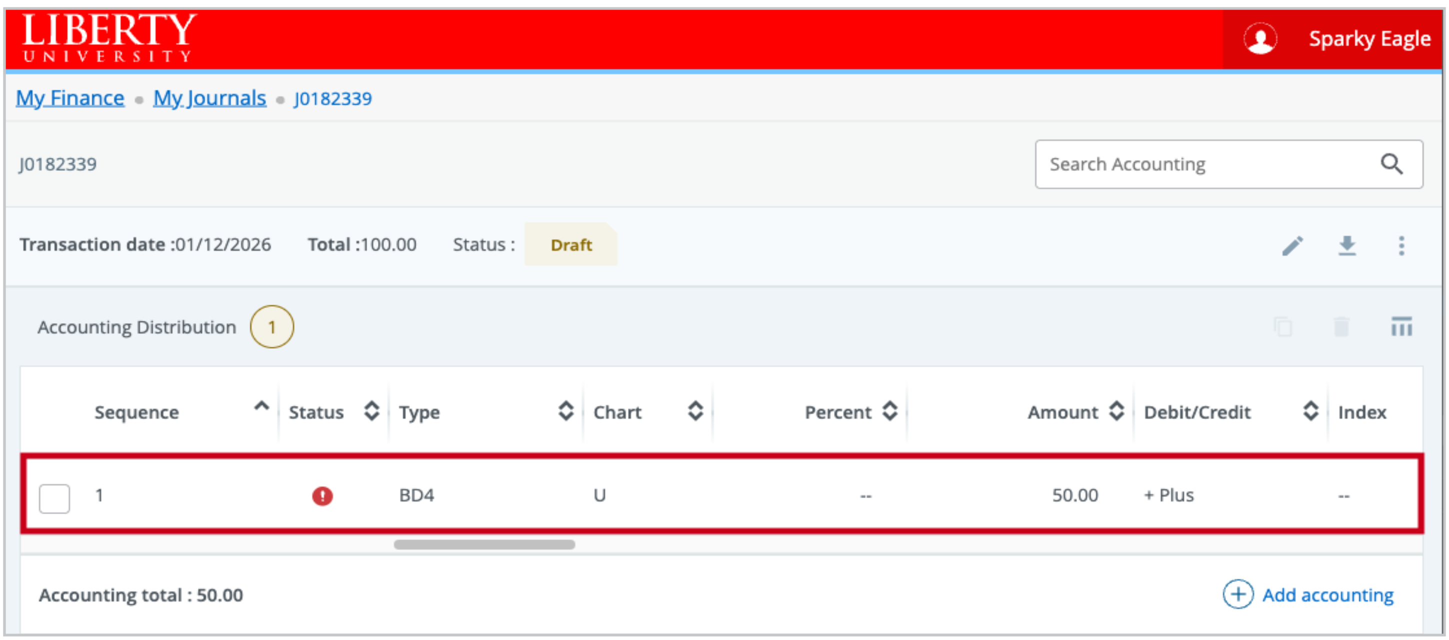


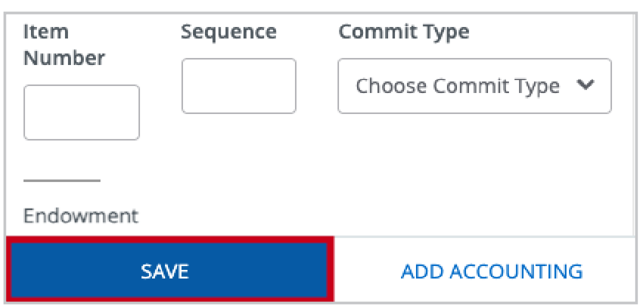
Note: The Budget Period must match the same month of the Transaction Date. Each number corresponds to the number of months since the start of the fiscal year (e.g., July = 1, August = 2, etc).

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

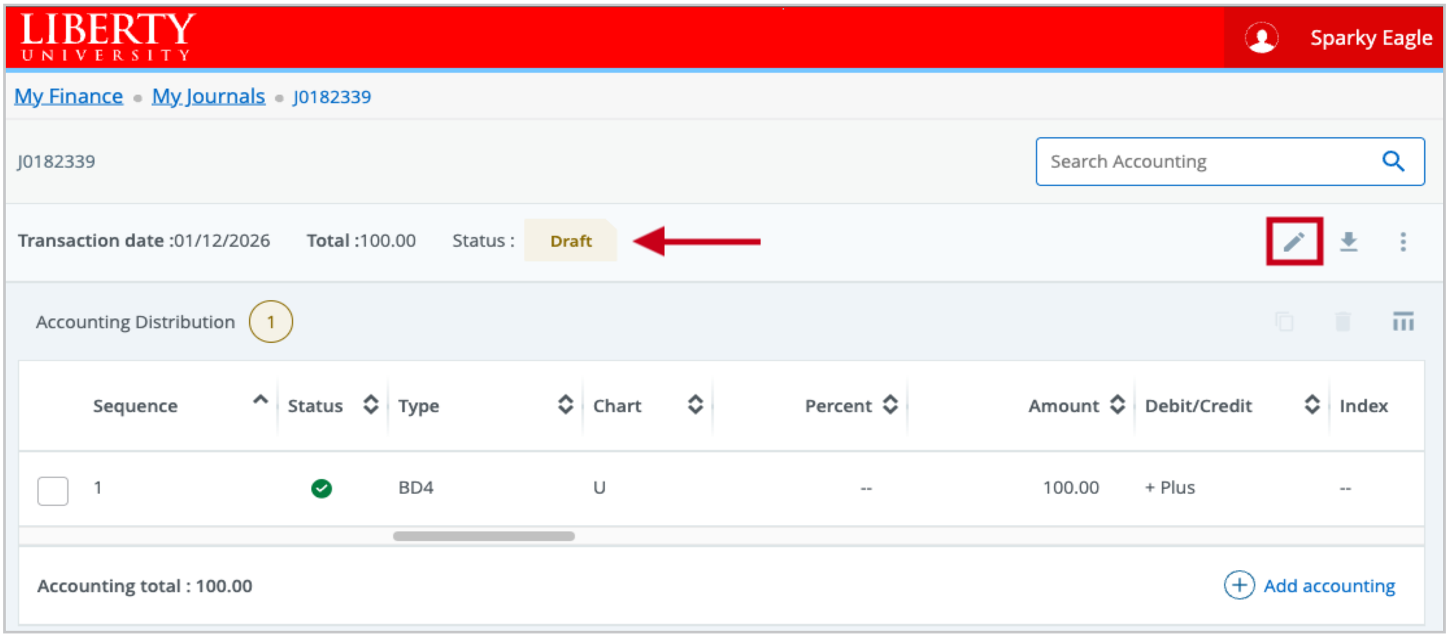


16. To edit a sequence, click on the **sequence**, make the necessary changes, and click **SAVE**.



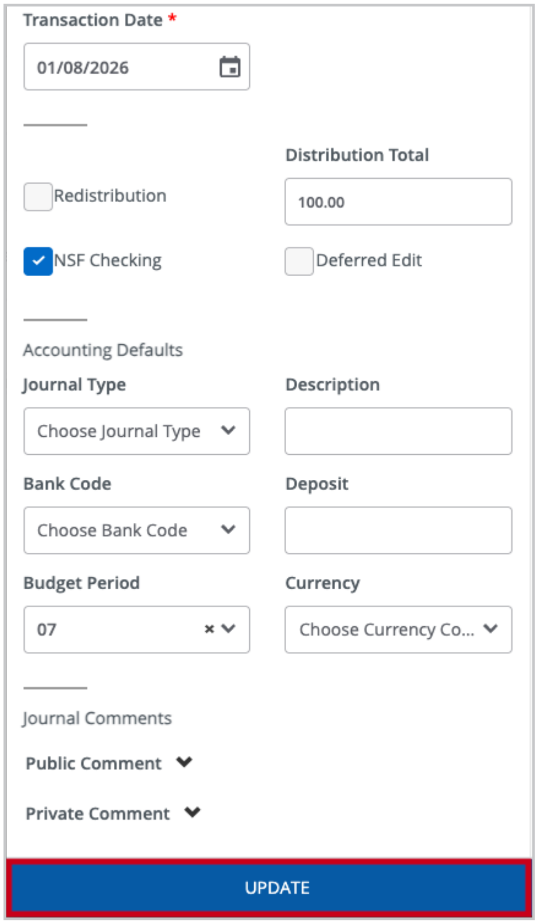


17. To make edits to the journal, click the **pencil icon**.

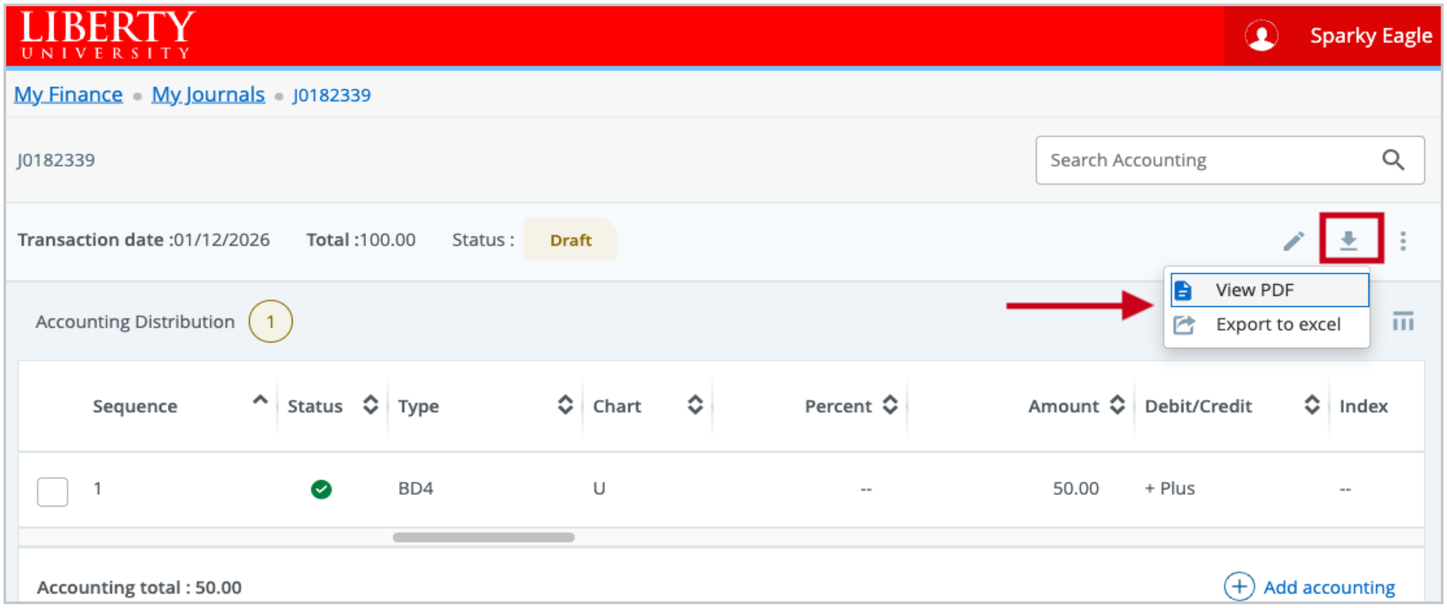


Note: You can only make edits to the entry in Draft status.

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

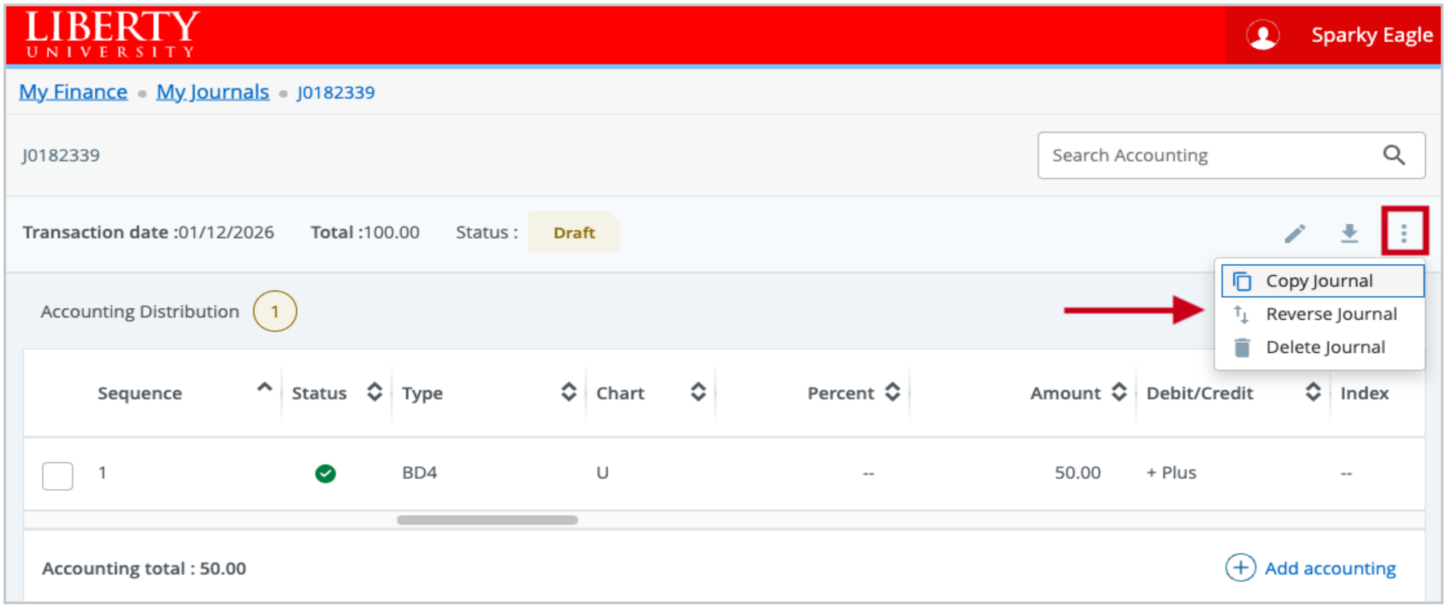


19. To download the journal, click the **download icon** to view the document in either PDF or Excel format.

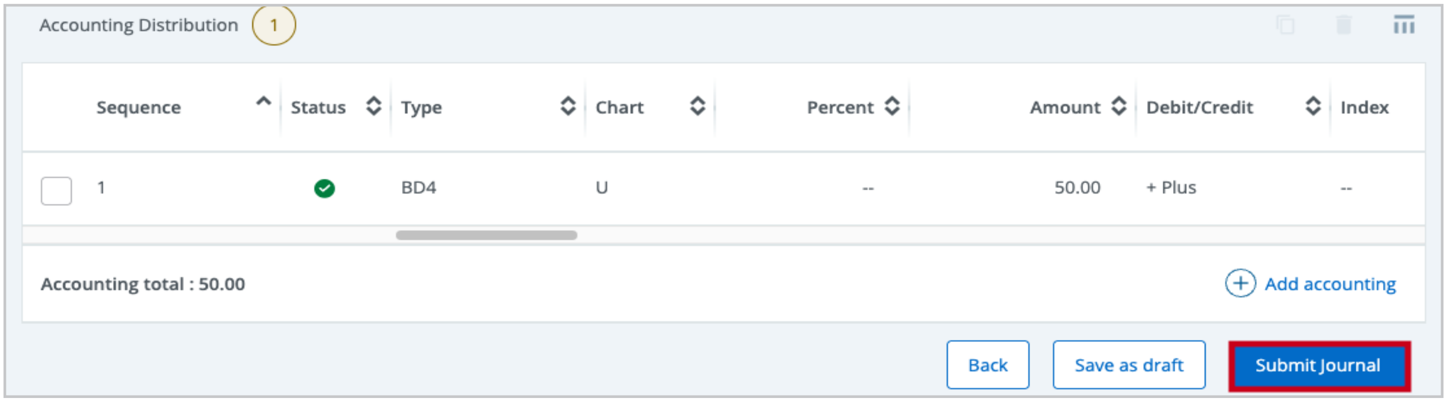


Note: Selecting View PDF will open the document PDF in a new tab. Selecting Export to excel will save the file to your computer.

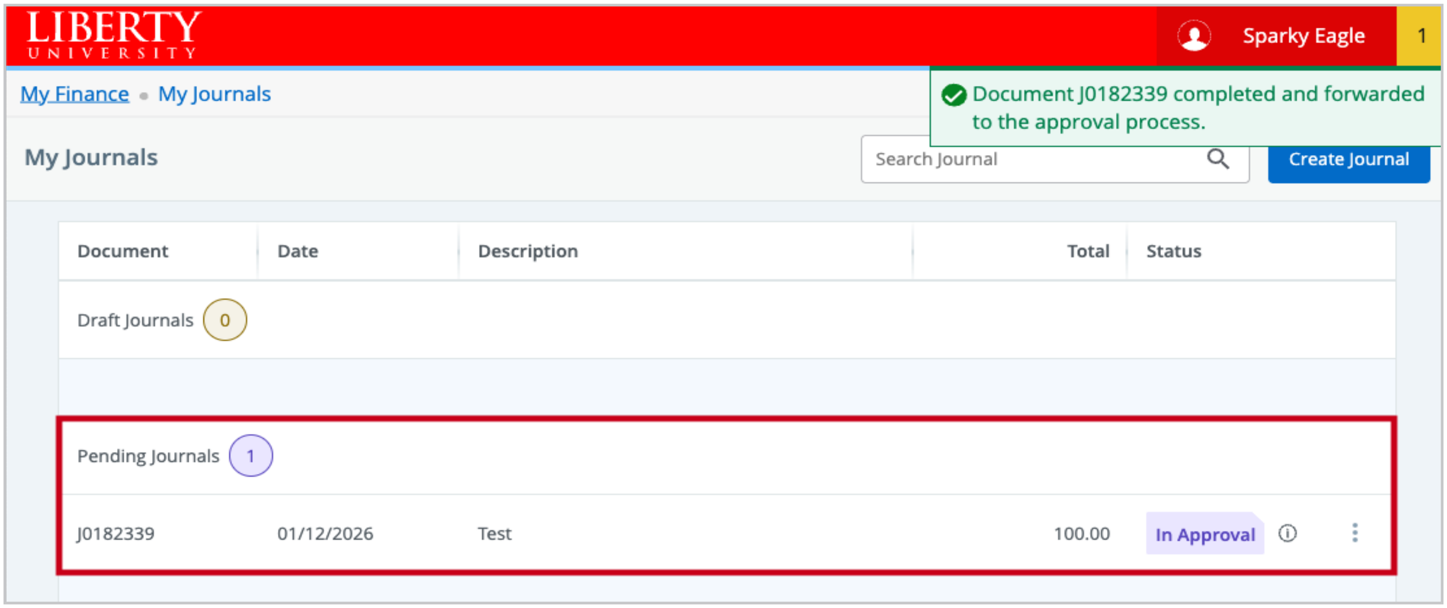
20. The **three-dot menu** allows you to **Copy**, **Reverse**, or **Delete** the journal entry.



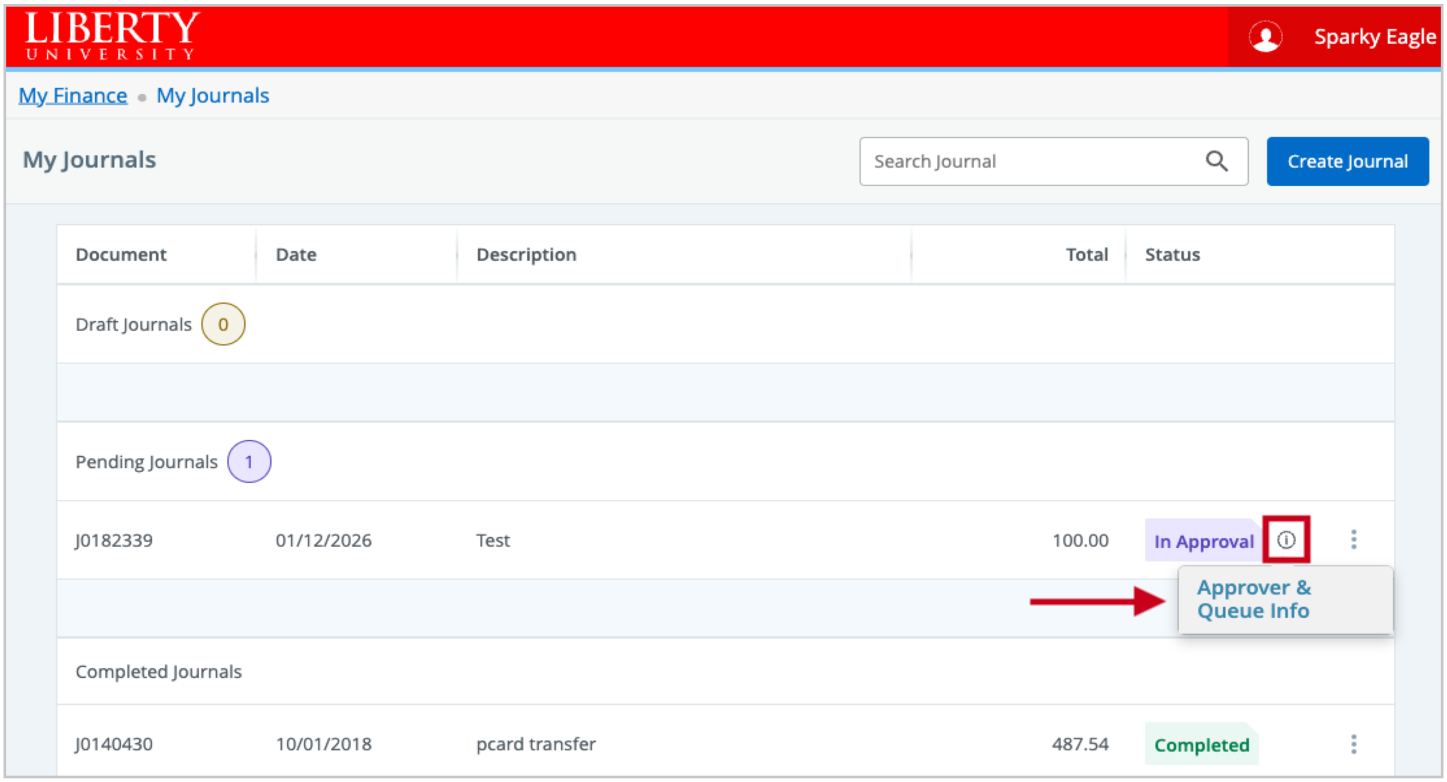
21. Click **Submit Journal** to move the document to the next approval process step.



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

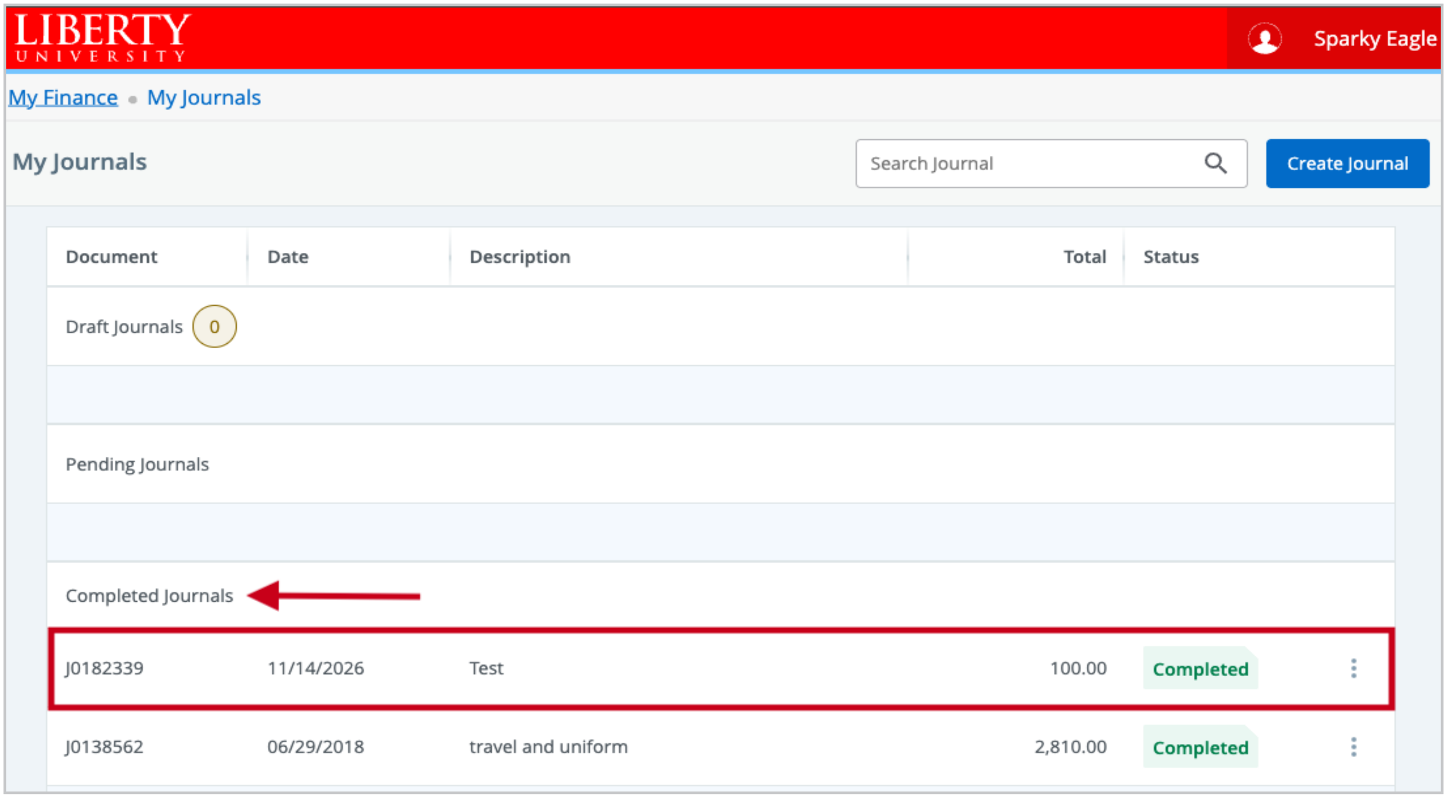


23. Select the **In Approval information** icon to view the approval hierarchy.

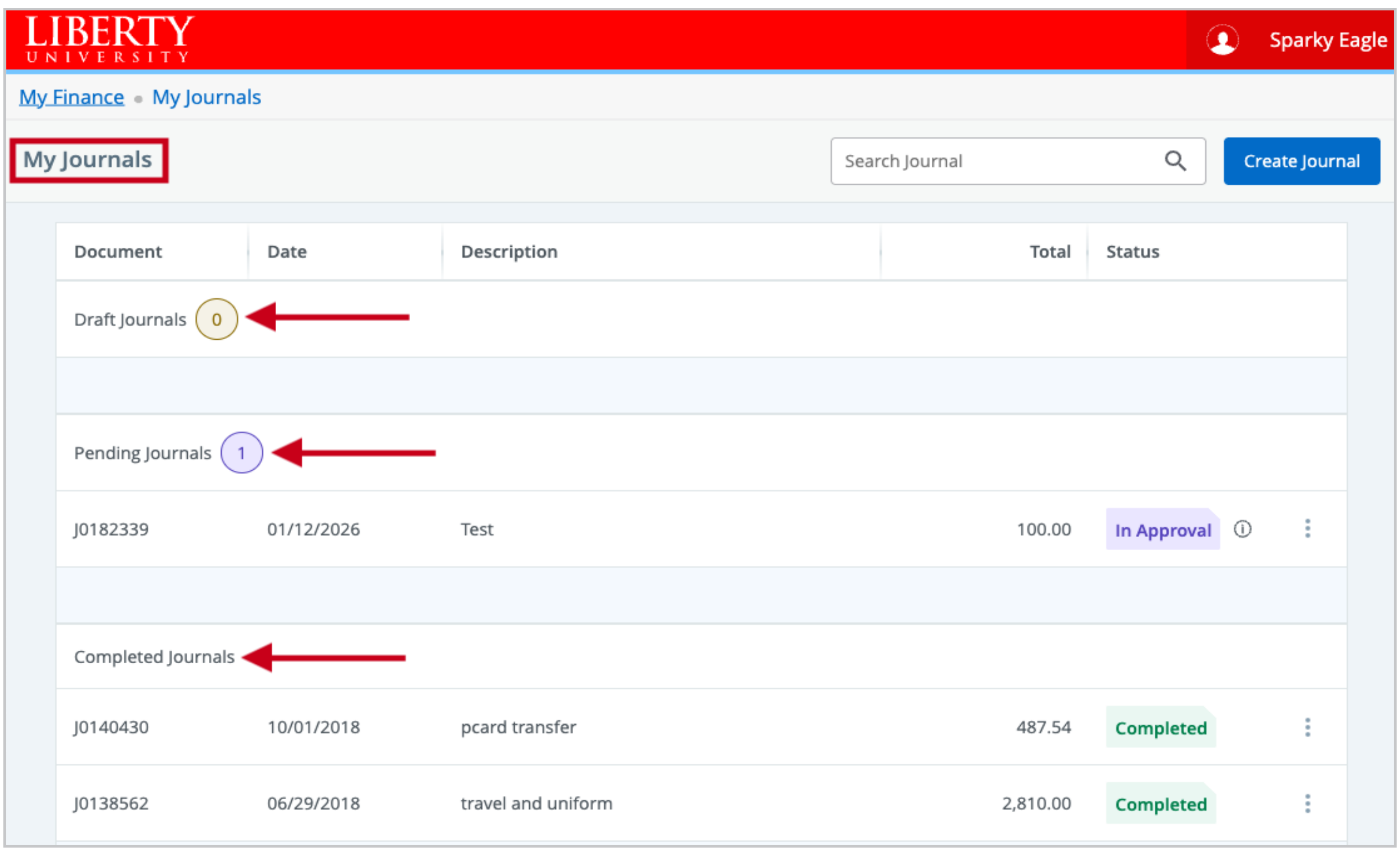


Note: SSB9 will not send an email notification. You must inform all approvers that the entry is available to review and approve.

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

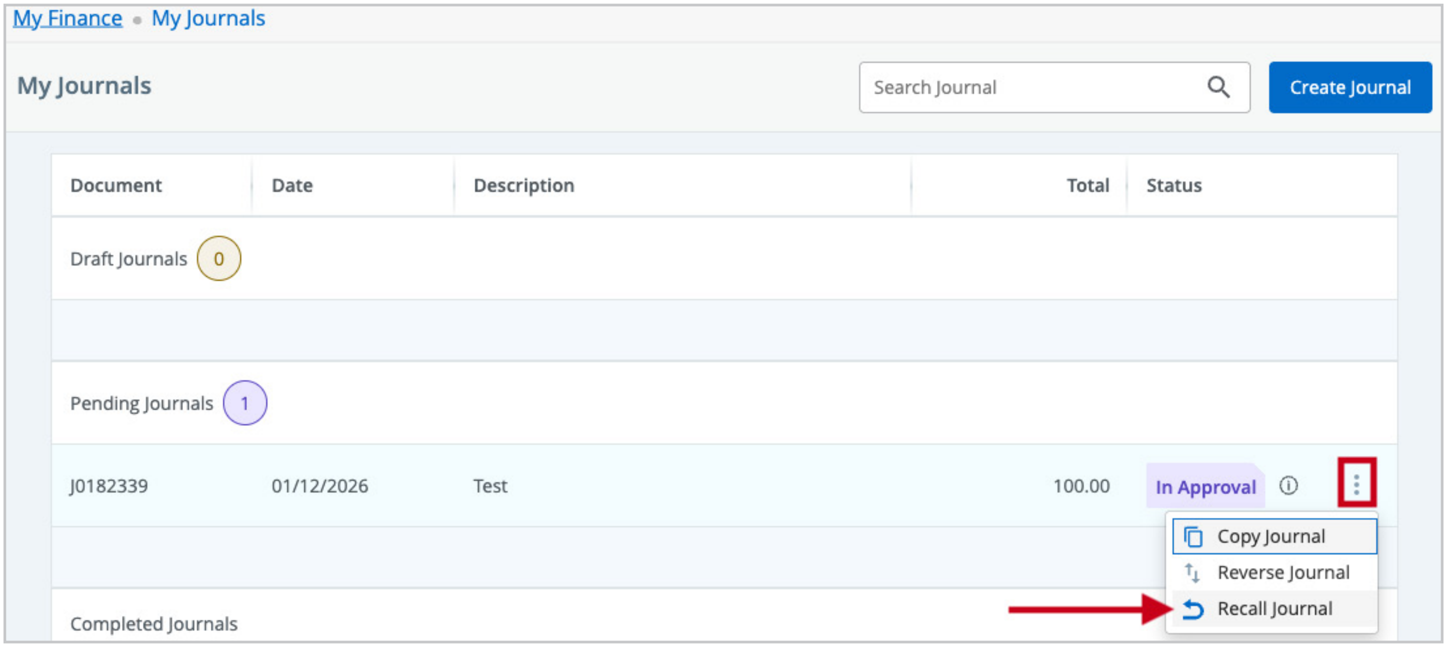


25. The **My Journals** dashboard shows all **Draft**, **Pending**, and **Completed Journals**.

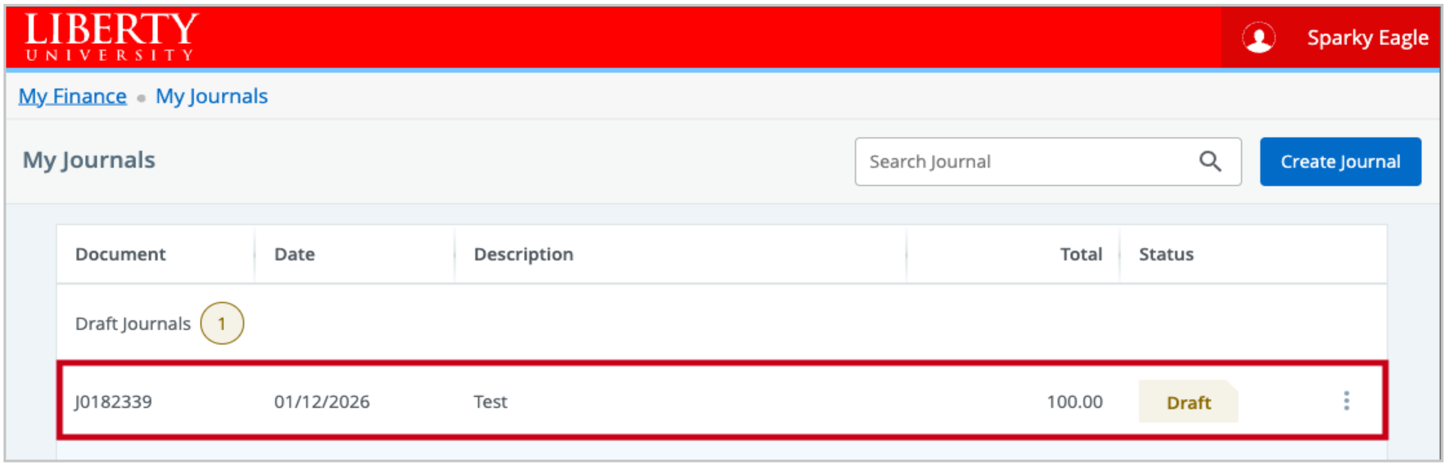


Note: Once a journal is in Approval, changes can no longer be made. You can recall the journal to make corrections or additional edits.

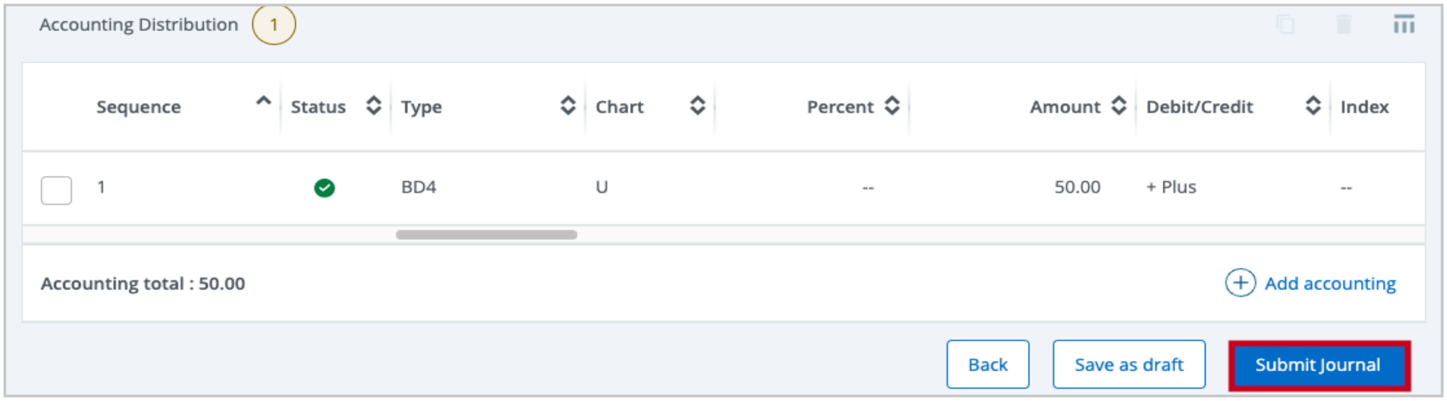
26. To recall a journal, click the **three-dot menu** to the right of the journal title and select **Recall Journal**.



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



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



Need Assistance?

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