



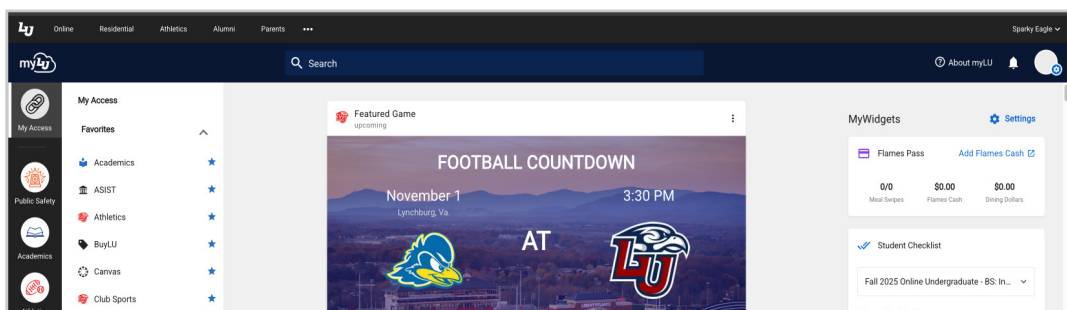
# Banner 9 Self-Service

## SSB9

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

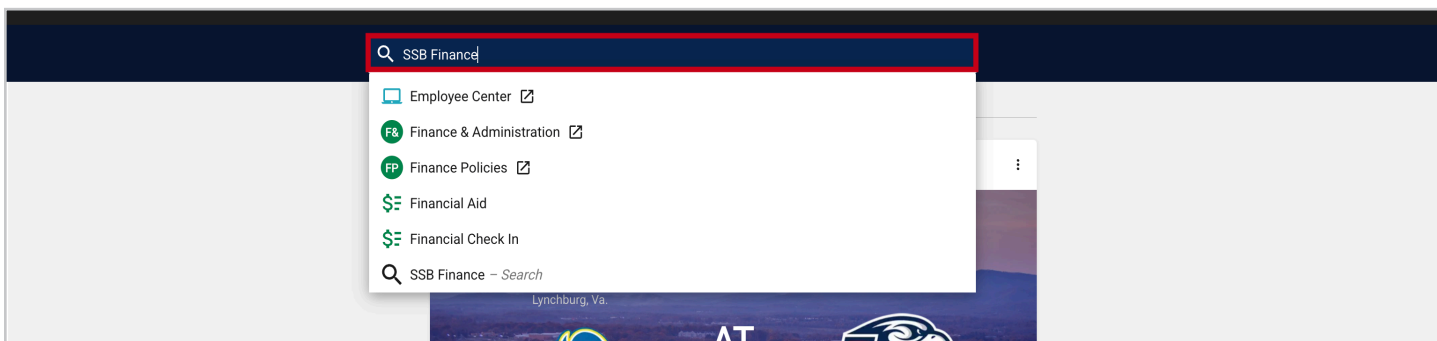
### Accessing the Finance Module

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

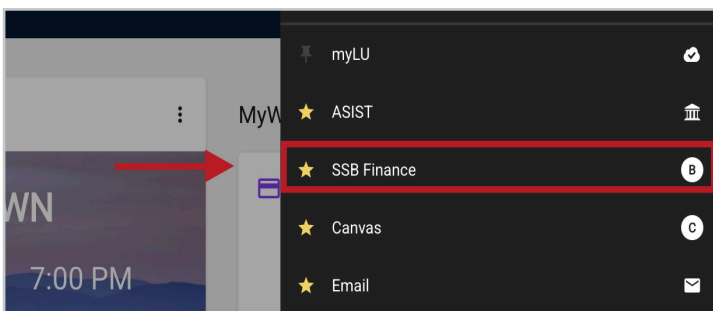
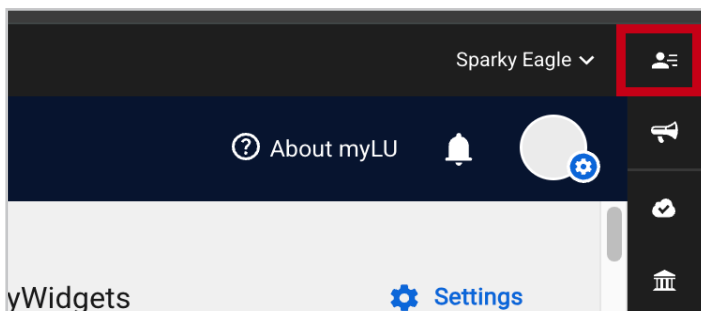


2. You can access the **SSB Finance** module in two ways:

- **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

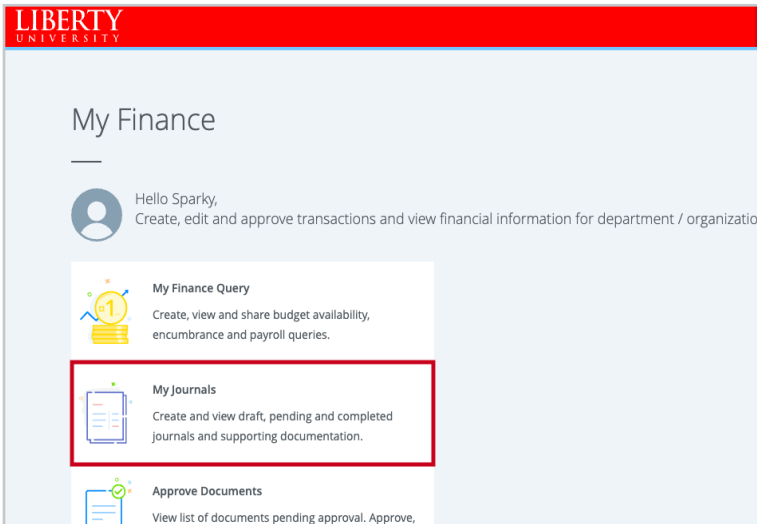


- **Option 2: Use the Global Header**
  - Click the **Global Header** menu
  - Select **SSB Finance** from the list

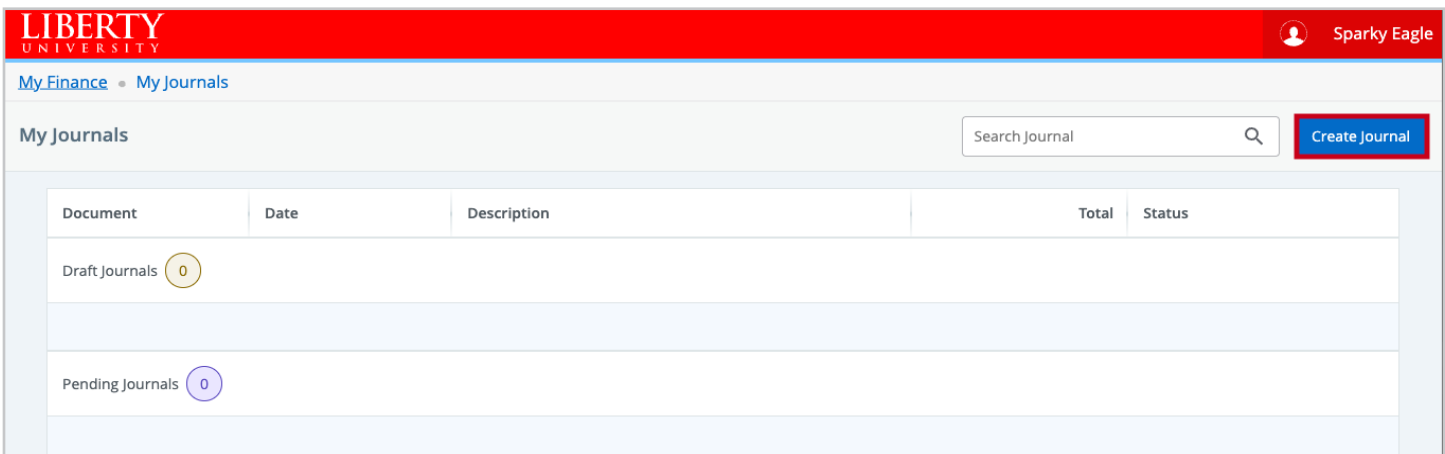


## Creating a New Budget Transfer Document

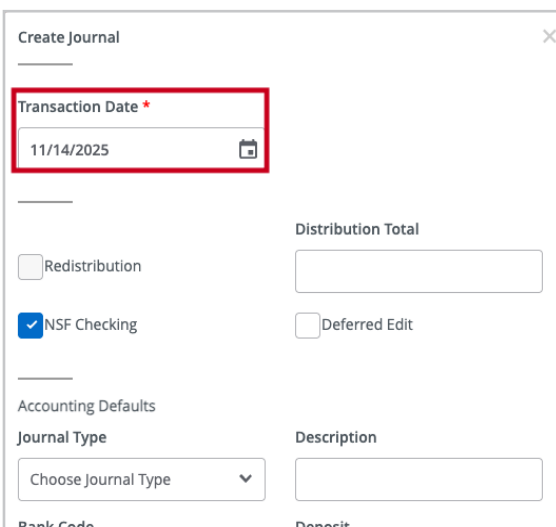
1. In the SSB Finance module, click **My Journals**.



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**.

The screenshot shows the 'Create Journal' form. The 'Transaction Date' is set to 01/13/2026. The 'Redistribution' checkbox is unchecked, and 'NSF Checking' is checked. The 'Accounting Defaults' section shows 'Journal Type' with a red arrow pointing to the dropdown menu. The dropdown menu is open, showing a search bar with 'BD' and a list of options: 'BD2 Permanent Budget Adjustments - SS', 'BD4 Temporary Budget Adjustment - SS' (highlighted in blue), 'REBD rebate exchange difference', 'ZBDP', and 'BBTS Feed - Deposit'. To the right of the dropdown, there are fields for 'Distribution Total', 'Deferred Edit', 'Description', 'Deposit', and 'Currency' (set to 'Choose Currency Code'). At the bottom, there is a 'Public Comment' field and a 'CREATE' button.

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

The screenshot shows the 'Create Journal' form with the 'Distribution Total' field highlighted by a red box. The value '100' is entered in this field. The 'Transaction Date' is now 11/14/2025. The 'Redistribution' checkbox is unchecked, and 'NSF Checking' is checked. The 'Deferred Edit' checkbox is also unchecked.

**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.

☐ Redistribution

100.00

☒ NSF Checking

☐ Deferred Edit

Accounting Defaults

Journal Type

Choose Journal Type

Description

Bank Code

Choose Bank Code

Deposit

Budget Period

Choose Budget Period

Currency

Choose Currency Code

Journal Comments

Public Comment

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.

Private Comment

Enter private comments for the journal

CREATE

**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**.

Journal Comments

Public Comment

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.

Private Comment

Enter private comments for the journal

CREATE

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' dropdown menu is highlighted with a red box and contains the selection 'BD4 Temporary Budget Adjustment - SS'. Other fields include 'Sequence Number : 1', 'Status :', '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 \*' dropdown menu is highlighted with a red box and contains the selection 'U Liberty University 7/1/09'. The 'Journal Type' dropdown menu now contains 'BD4 Temporary Budget Adjustment - SS'. All other fields and buttons remain the same as in the previous screenshot.

**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 \* Index  
U Liberty Univers... x v 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

---

☐ NSF Override Document Reference

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.

This screenshot shows a portion of a web form. On the left, there is an 'Amount' field with '50.00' and a 'Description' field. On the right, the 'Debit/Credit' dropdown menu is open, showing options: 'None', 'Debit', 'Credit', '+ Plus' (highlighted in blue), and '- Minus' (highlighted with a red box). Below the dropdown is a 'Choose Budget Period' dropdown menu.

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

This screenshot shows the same form as before, but now the 'Description' field contains the text 'Test' and is highlighted with a red box. The 'Debit/Credit' dropdown is now closed and shows '+ Plus'. Other fields like 'Amount' (50.00), 'Bank' (Choose Bank Code), and 'Accrual Indicator' (unchecked) are also visible.

**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.

This screenshot shows the form with the 'Budget Period' dropdown menu open. The dropdown list shows months from '01' to '07', with '05' selected and highlighted in blue. The 'Description' field still contains 'Test'. At the bottom of the form, there are two buttons: 'SAVE' (highlighted with a red box) 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

Currency

Choose Currency Code ▼

Encumbrance

Encumbrance Number

Choose Encumbrance Docu... ▼

Action

Choose Action ▼

Item Number

Sequence

Commit Type

Choose Commit Type ▼

Endowment

Gift Date

MM/dd/yyyy

Number of Units

SAVE

ADD ACCOUNTING

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

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Sparky Eagle

[My Finance](#) • [My Journals](#) • J0182339

J0182339

Search Accounting

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		BD4	U	--	50.00	+ Plus	--

Accounting total : 50.00

Add accounting

Item Number

Sequence

Commit Type

Choose Commit Type ▼

Endowment

SAVE

ADD ACCOUNTING



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

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J0182339

Search Accounting

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		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**.

Transaction Date \*  
01/08/2026

☐ Redistribution

☒ NSF Checking

Distribution Total  
100.00

☐ Deferred Edit

Accounting Defaults

Journal Type  
Choose Journal Type

Bank Code  
Choose Bank Code

Budget Period  
07

Description

Deposit

Currency  
Choose Currency Co...

Journal Comments

Public Comment

Private Comment

UPDATE

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

The screenshot shows the Liberty University journal entry interface. At the top, the Liberty University logo is on the left, and the user name 'Sparky Eagle' is on the right. Below the header, the breadcrumb 'My.Finance > My.Journals > J0182339' is displayed. The journal entry details show 'Transaction date :01/12/2026', 'Total :100.00', and 'Status : Draft'. A search bar labeled 'Search Accounting' is on the right. Below the details, the 'Accounting Distribution' section is highlighted with a yellow circle containing the number '1'. A red box highlights the download icon (a downward arrow) in the top right corner of the distribution table. A red arrow points from this icon to a dropdown menu that contains two options: 'View PDF' and 'Export to excel'. The distribution table itself has columns for Sequence, Status, Type, Chart, Percent, Amount, Debit/Credit, and Index. The first row shows Sequence '1', Status '✓', Type 'BD4', Chart 'U', Percent '--', Amount '50.00', and Debit/Credit '+ Plus'. The 'Accounting total : 50.00' is shown at the bottom left, and an 'Add accounting' button is at the bottom right.

**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.

This screenshot is similar to the previous one, showing the same journal entry details. However, a red box highlights the three-dot menu icon (a vertical ellipsis) in the top right corner of the distribution table. A red arrow points from this icon to a dropdown menu that contains three options: 'Copy Journal', 'Reverse Journal', and 'Delete Journal'. The rest of the interface, including the header, breadcrumb, journal details, and the distribution table, is identical to the previous screenshot.

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

This screenshot shows the bottom portion of the journal entry page. It includes the 'Accounting Distribution' section with the same table as the previous screenshots. Below the table, the 'Accounting total : 50.00' is displayed, and an 'Add accounting' button is on the right. At the bottom of the page, there are three buttons: 'Back', 'Save as draft', and 'Submit Journal'. The 'Submit Journal' button is highlighted with a red border.

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

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My.Finance • My Journals

Document J0182339 completed and forwarded to the approval process.

My Journals

Search Journal

Create Journal

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.

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My.Finance • My Journals

My Journals

Search Journal

Create Journal

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.

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My Finance • My Journals

My Journals

Search Journal

Create Journal

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**.

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Sparky Eagle

My Finance • My Journals

My Journals

Search Journal

Create Journal

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**.

[My Finance](#) • [My Journals](#)

**My Journals** Search Journal Create Journal

Document	Date	Description	Total	Status
Draft Journals <span>0</span>				
Pending Journals <span>1</span>				
J0182339	01/12/2026	Test	100.00	In Approval <span>ⓘ</span> <span>⋮</span>
Completed Journals				

⋮  
 Copy Journal  
 Reverse Journal  
 Recall Journal

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

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[My Finance](#) • [My Journals](#)

**My Journals** Search Journal Create Journal

Document	Date	Description	Total	Status
Draft Journals <span>1</span>				
J0182339	01/12/2026	Test	100.00	Draft <span>⋮</span>

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

Accounting Distribution 1

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

Accounting total : 50.00 ⊕ Add accounting

Back Save as draft Submit Journal

## Need Assistance?

For more information on SSB9, visit [Liberty.edu/SSB9](http://Liberty.edu/SSB9).