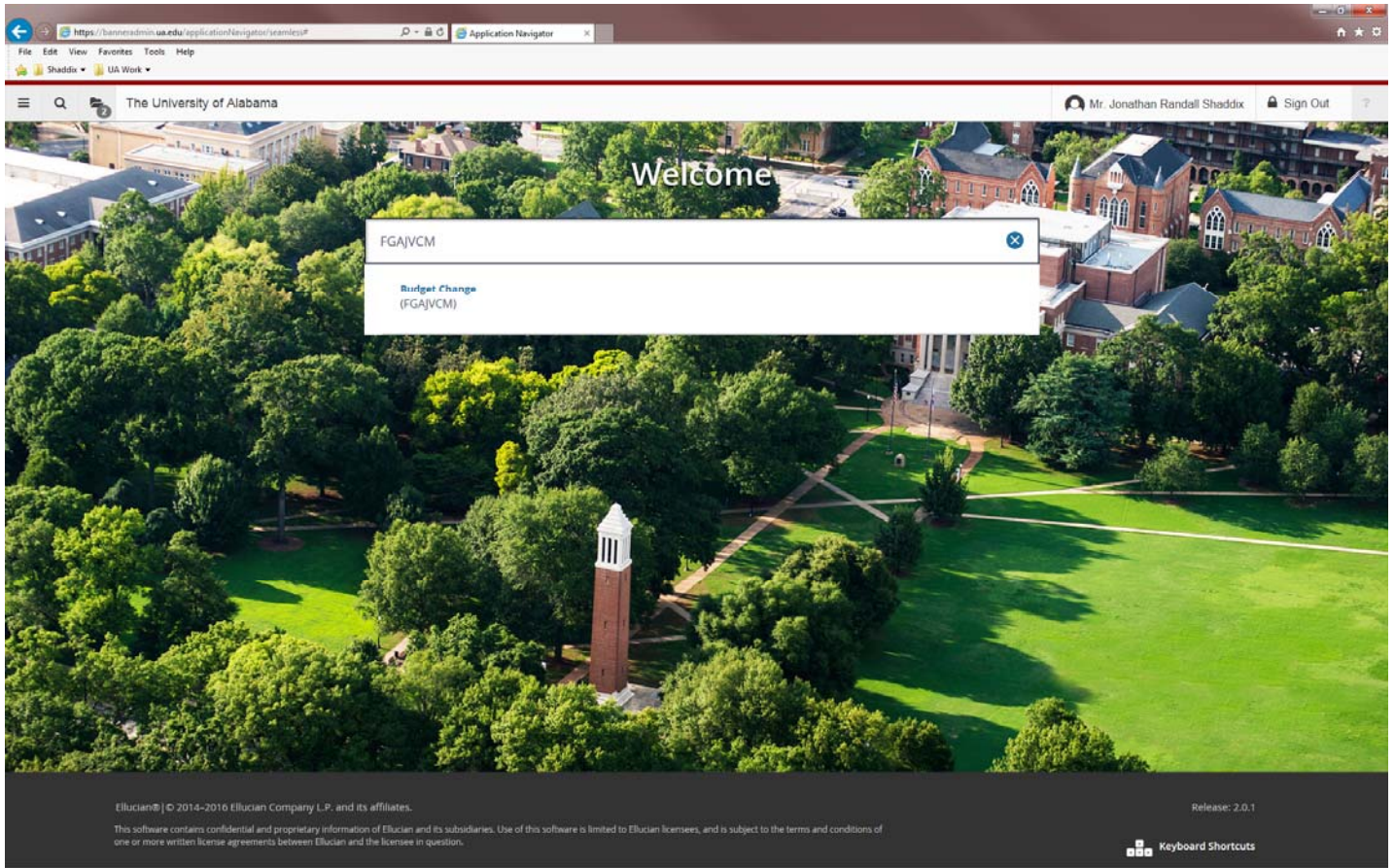FGAJVCM – Budget Change Screen

In the "Document Number" box, you can enter "Next" or leave blank. Banner will generate the next available "Z" document for you

Select "Go" or use key combination "Alt + Page Down"

Enter the "Transaction Date"

Enter the "Document Total" (this total is the gross total of all lines that will be entered in detail)

To enter document text, select "Related" from top right, and then select "Document Text [FOATEXT]"

≡   Q   🐎   The University of Alabama   Mr. Jonathan Randall Shaddix   🔒 Sign Out   ?

✕   General Text Entry FOATEXT 9.0 (PROD)   📄 ADD   📄 RETRIEVE   🖥 RELATED   ⚙ TOOLS   1

                                                                        Start Over

Type: JV   Code: Z0137169   Default Increment: 10

▾ GENERAL TEXT ENTRY   ➕ Insert   ➖ Delete   🗐 Copy   ⌄ Filter

Text   Print *   Line

                                                   ☐

⏮ 1 of 1 ⏭   10 ▾ Per Page   Record 1 of 1

⏫   ⏬   CANCEL   SELECT   SAVE

EDIT   Record: 1 / 1   FOBTEXT.FOBTEXT_TEXT [1]   🅰

On this screen, enter your information on the lines for "Text". If need more than one line, use the down arrow on your keyboard to get to the next line

Then select "Save" on bottom right corner

Then select the "X" at the top left to close this screen, and this will return you to the header section of FGAJVCM

You will notice that once document text is entered, there is now a check mark in the box for "Document Text Exists"

Do not place a check mark or select the boxes for "NSF Checking" or "Deferred Edit" as the system handles these through other processes

Now you can select the "Down Arrow with the Underscore" on the bottom left or use key combination "Alt + Page Down" to go to the next section

This section is where you will enter your detailed information for the budget change

Seq	will populate for you
Jrnl Type	will be either: BD02 for a permanent change
	BD04 for a temporary change
COA	will be the chart of accounts you are effecting (most likely "A")
Index	Leave Blank
Fund	will be the Fund you are effecting
Orgn	will be the Organization you are effecting
Acct	will be the Account you are effecting
Prog	will be the Program Code you are effecting
Act	Leave Blank (unless your department utilizes Activity Codes)
Locn	Leave Blank (unless your department utilizes Location Codes)
Amount	will be Amount of change for FOAP on this line
+/-	will be either: + if increasing revenue or expense
	- if decreasing revenue or expense

Remember budget changes must be balanced, so if you are moving move between expense accounts (6##### or 7#####) you will use both a "+" and a "-" on the respective lines so that the entry is balanced. If you are moving move between revenue (5#####) and expense account (6##### or 7#####) you will use the same sign on each respective line so that the entry is balanced, because to budget an expense increase from revenue the revenue must also increase to cover

Description	will be a brief description for the change
Position No	will be used for 6##### accounts, and for the position effected
Budget Period	will populate for you

This information will be required for each line needed to create a balance budget change

You may move between lines by using the down arrow on your keyboard or using the options of "+ Insert", "- Delete" or "Copy". "Copy" will copy the information from the prior line to the next line and you may need to adjust the information such as the account, organization or remove/add a position number.

Once finished with detail, navigate to the next section by selecting the "Down Arrow with the Underscore" on the bottom left or use key combination "Alt + Page Down"

Choose either:
- "Complete" to complete the budget change and move to approvals
- Or
- "In Process" to leave it as incomplete so that you may come back to the budget change and update later before sending for approval