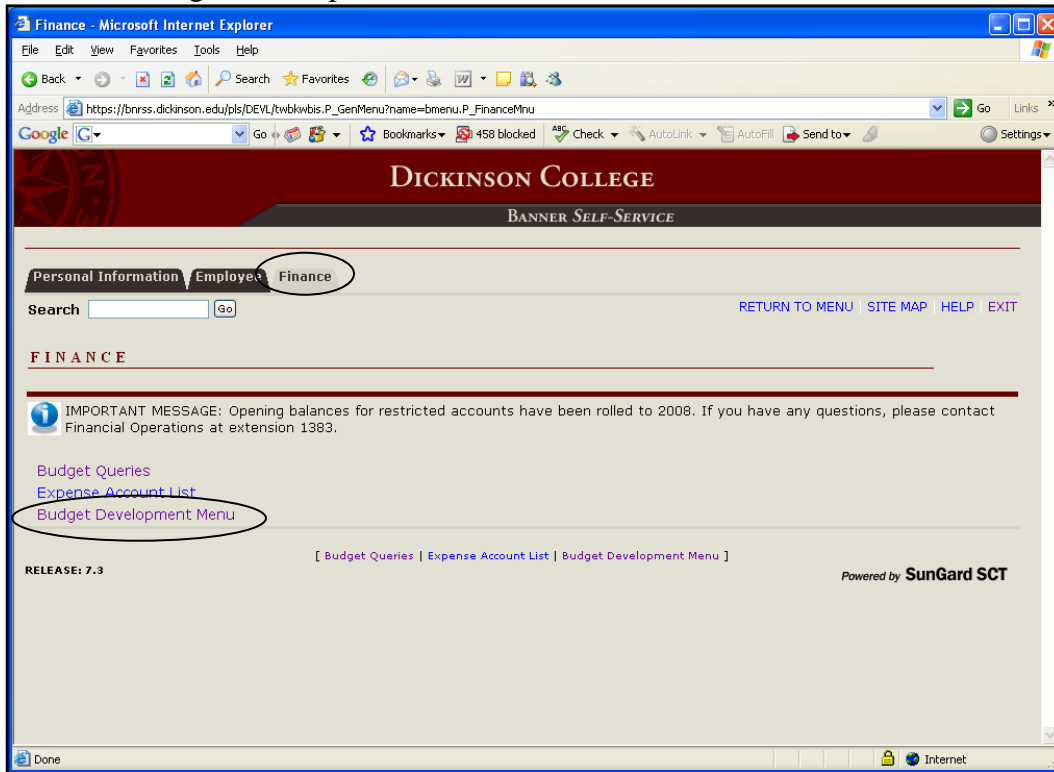


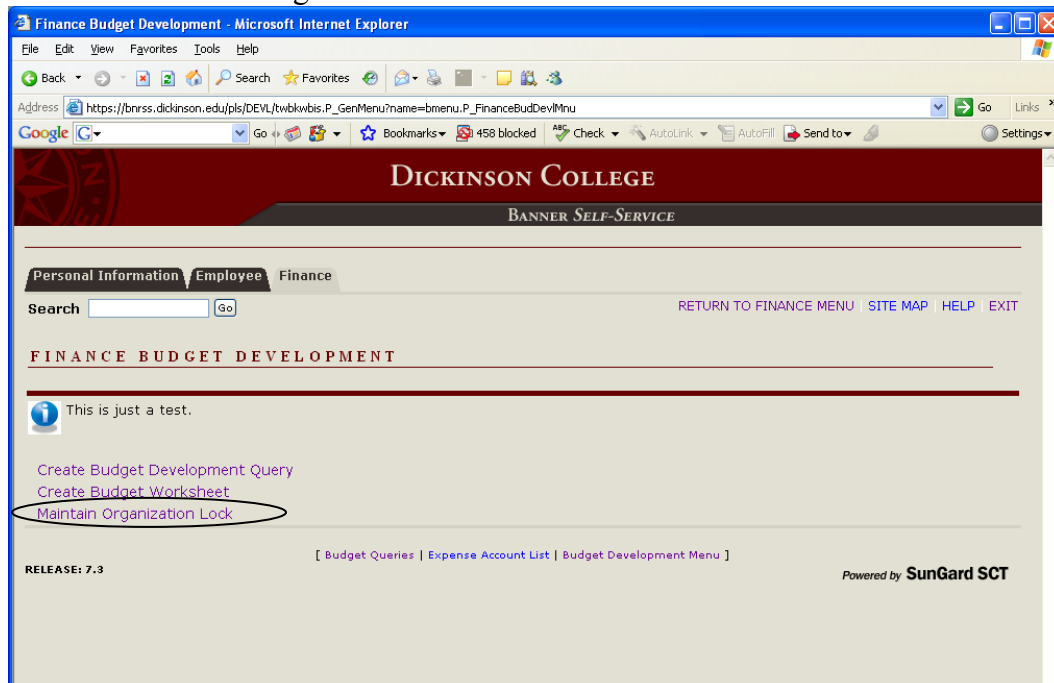
Banner Budget Development in Banner Self-Service

Instructions for Lock Process

1. Log into Banner Self-Service and go to “Finance” Tab.
2. Click on “Budget Development Menu” link



3. Click on “Maintain Organizational Lock” link.



4. Enter Parameters

- *Chart of Accounts:* “D”
- *Budget:* Enter budget ID# as supplied by the Budget Office. Annually you will receive new ID# via documentation or e-mail. Example below: “FY10”
- *Phase 1:* Enter phase ID# as supplied by the Budget Office. Annually you will receive new Budget Phase# via documentation or e-mail. Example below: “EEM10”. Do not enter anything into *Phase 2* or *Phase 3* fields.
- “*Current Status:* Defaults to “All”
- *Organization:* Enter hierarchal number for organizational group. This number will be the first number of the organizations in your division, plus three zeros. Example below: “3000”
- Click on “Submit” button.

The screenshot shows a web browser window titled "Budget Development Organization Lock - Microsoft Internet Explorer". The address bar shows the URL: https://bnrapp2.dickinson.edu/pls/TEST/bwfkzpar.P_LockOrgn_Parm. The page header includes the Dickinson College logo and "BANNER SELF SERVICE". Below the header are navigation tabs for "Personal Information", "Employee", and "Finance". A search bar is present with a "Go" button. The main heading is "Budget Development Organization Lock". An information icon and text state: "Chart, Budget ID and at least one Phase required. Select Default Phases to default phase information from the Budget. Select Status to display (or All). Leave Organization null to start with highest organizations(s) you are authorized to change, or designate a starting point." The form contains the following fields: "Chart of Accounts" (D), "Budget" (FY10), "Phase 1" (EEM10), "Current Status" (All), and "Organization" (3000). There are also "Phase 2" and "Phase 3" fields which are empty. A "Submit" button is circled in red. At the bottom, there is a footer with "RELEASE: 7.1.0.1", "[Budget Queries | Expense Account List | Budget Development Menu]", and "Powered by SunGard SCT". The Windows taskbar at the bottom shows the start button, several open applications, and the system clock at 2:53 PM.

5. Perform Lock:

You can lock all organizations here by putting a check mark in the “Change Status” check box and clicking the “Update” button. (If “Current Status” is “Locked”, then a check mark in the “Change Status” check box and clicking the “Update” button will unlock the organizations so further changes can be made.)

OR, Click on “3000” to display the hierarchy of organizations to perform locks individually.

Budget Development Organization Lock

Parameters

Chart of Accounts D	Dickinson College
Budget ID	FY10 Fiscal Year 2010
Phase 1	EEM10 Exp-EMCR-10
Phase 2	
Phase 3	
Lock Status	All
Organization	3000 Enrollment Mgmt/College Relations

Organization Lock Status

Organization Title	Exp-EMCR-10	Current Status	Change Status
3000 Enrollment Mgmt/College Relations	Unlocked	<input type="checkbox"/>	

Review

Update

Clicking on “3000” displays hierarchy. Continue to click numbers to display next level of hierarchy until individual organizations are displayed. Then, use checkboxes and the “Update” button to lock or unlock organizations.

Parameters

Chart of Accounts	D	Dickinson College
Budget ID	FY10	Fiscal Year 2010
Phase 1	EEM10	Exp-EMCR-10
Phase 2		
Phase 3		
Lock Status	All	
Organization		
Drill From Organization	3000	Enrollment Mgmt/College Relations

Organization Lock Status

Organization Title	Exp-EMCR-10	Current Status	Change Status
30100 EMCR	Unlocked	<input type="checkbox"/>	
30200 Admissions	Unlocked	<input type="checkbox"/>	
30300 Athletics	Unlocked	<input type="checkbox"/>	
30400 Career Center	Unlocked	<input type="checkbox"/>	
30500 College Relations	Unlocked	<input type="checkbox"/>	
30600 Inst Research	Unlocked	<input type="checkbox"/>	
30700 Financial Aid	Unlocked	<input type="checkbox"/>	
30800 Pre-College	Unlocked	<input type="checkbox"/>	

Review

Update

6. **Completing Budget Process:**

Once an organization is locked by the VP, Budget Officers can still access and view their Budget Worksheets, but cannot make any further changes.

After review and approval, the VP or VP's proxy should perform the lock process on all organizations in the division. Then, the Director of Planning and Budget should be informed that the process is complete.

The Budget Office will perform a final lock on the organizations. At that point, no additional changes can be made through the Banner Self-Service Budget Development Module by anyone. Contact the Director of Planning and Budget to make changes after the final lock process.