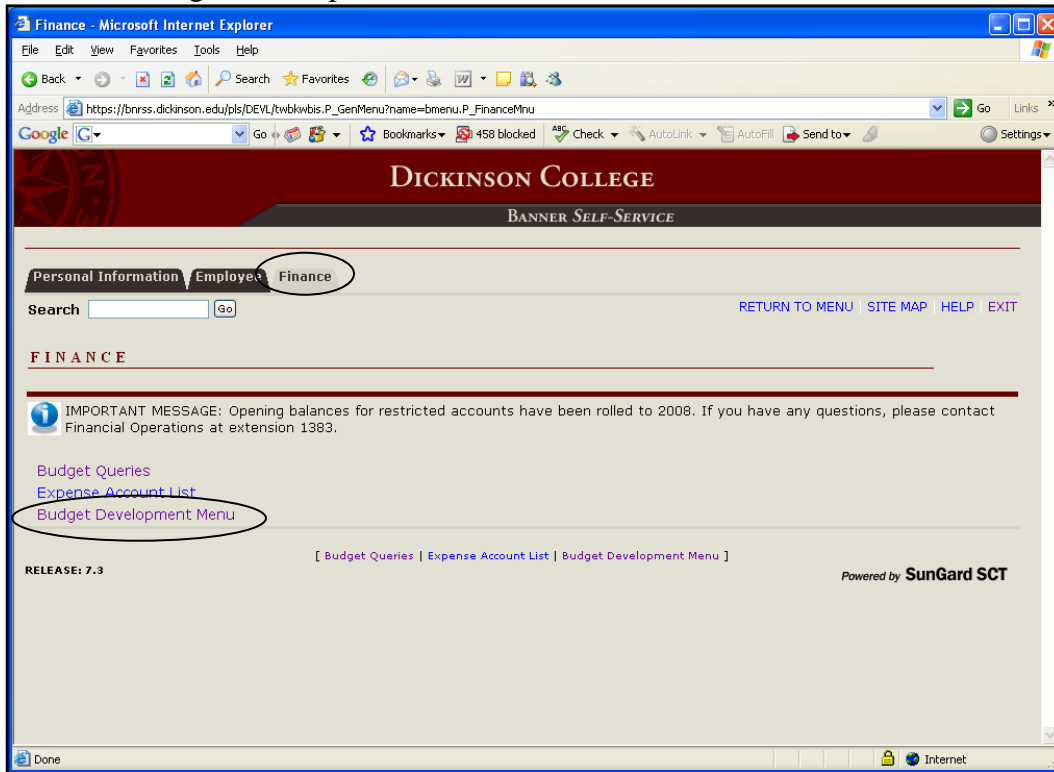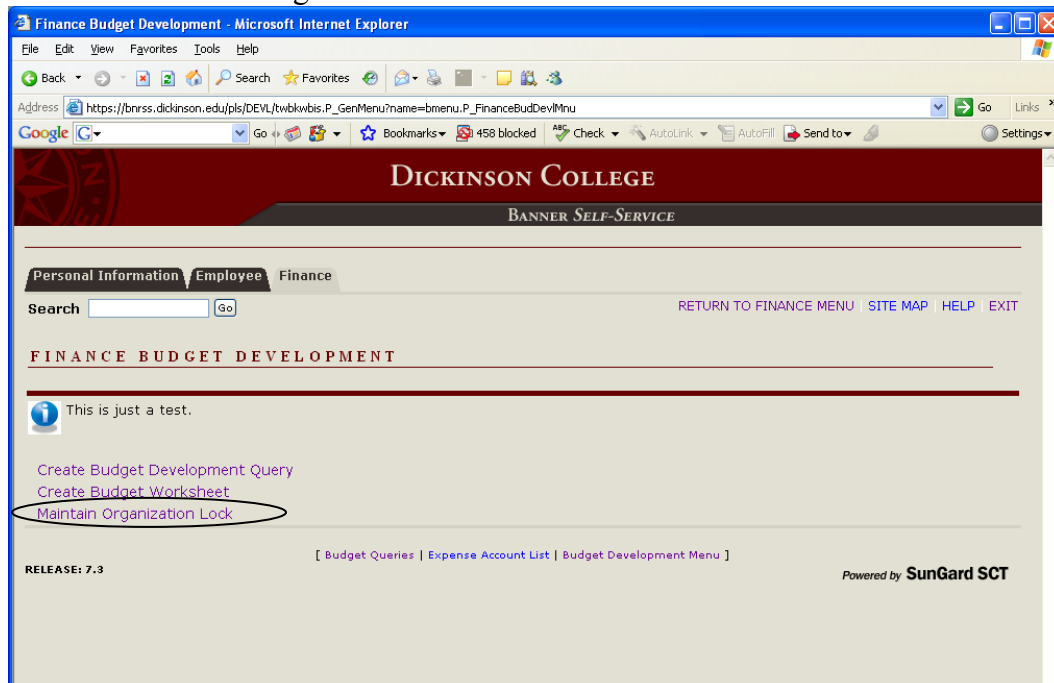# Banner Budget Development in Banner Self-Service

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.

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	☐

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	☐
30200	Admissions	Unlocked	☐
30300	Athletics	Unlocked	☐
30400	Career Center	Unlocked	☐
30500	College Relations	Unlocked	☐
30600	Inst Research	Unlocked	☐
30700	Financial Aid	Unlocked	☐
30800	Pre-College	Unlocked	☐

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.