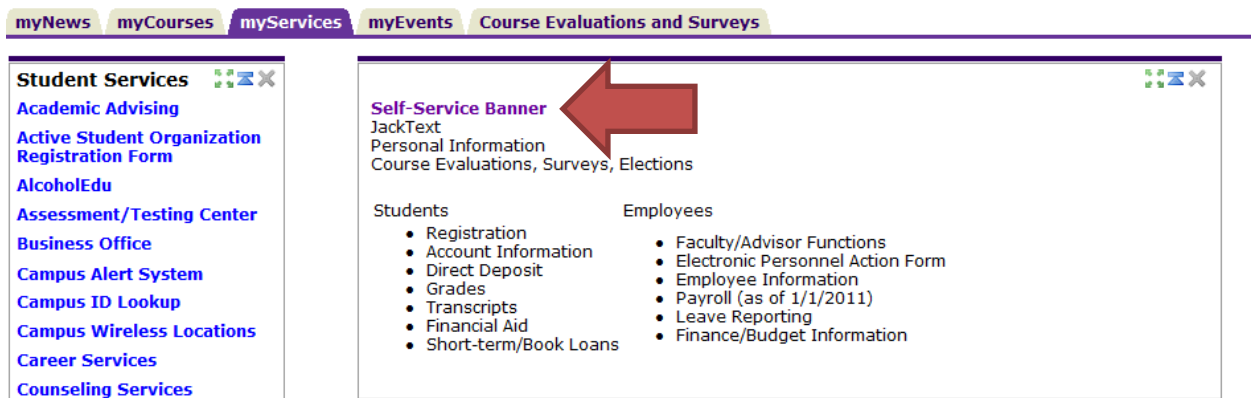


## Budget Department Revenue (BDR)

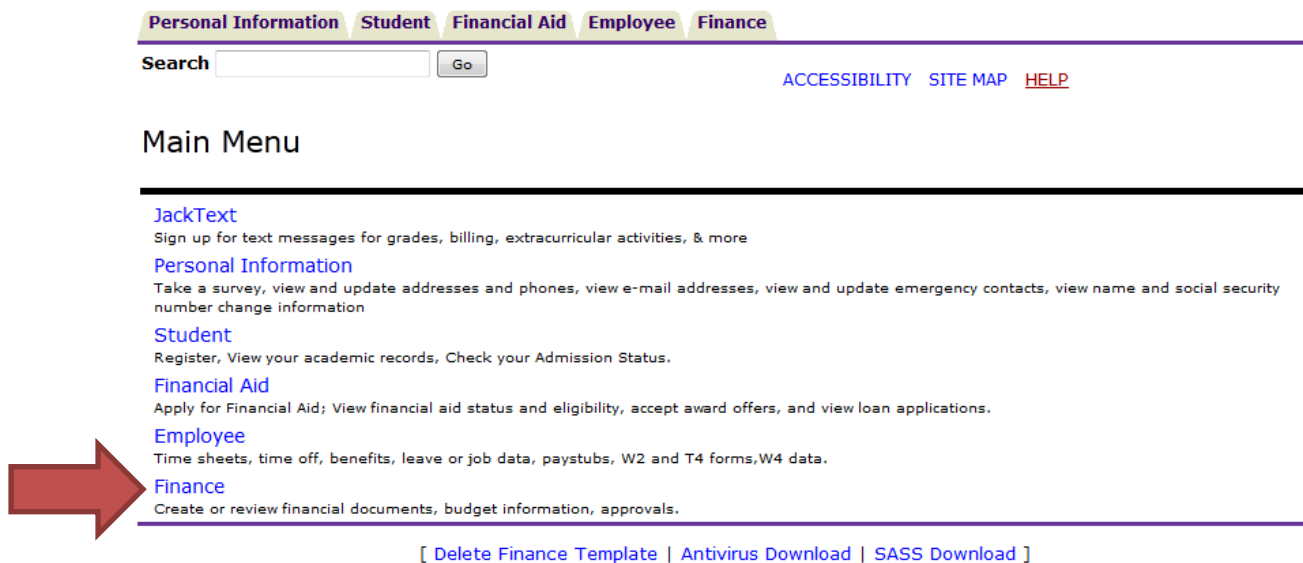
- ❖ This type of Budget Transfer is used when a department needs to recognize revenue in a revenue producing FOAP (i.e. recognize \$1,000 of overrealized income from Retail Sales (55000) to O&M (72B0).
- ❖ Revenue budgets are based on projected income and should be reviewed periodically to ensure estimates are being met. It may be necessary to increase/decrease the budget if receipts are more/less than expected.
- ❖ Revenue recognition equal to or greater than \$10,000 must be completed through a Banner Budget Transfer form, found on the Budget Office Website:  
<http://www.sfasu.edu/vpfa/documents/banner-budget-transfer-form.pdf>.

1. Log in to **mySFA**, choose the “**myServices**” tab, and click “**Self-Service Banner**”



The screenshot shows the mySFA website interface. At the top, there are navigation tabs: myNews, myCourses, myServices (selected), myEvents, and Course Evaluations and Surveys. On the left, there is a sidebar menu for Student Services, including Academic Advising, Active Student Organization Registration Form, AlcoholEdu, Assessment/Testing Center, Business Office, Campus Alert System, Campus ID Lookup, Campus Wireless Locations, Career Services, and Counseling Services. The main content area displays the Self-Service Banner link, which is highlighted with a red arrow. Below this link, there are two columns of services: Students (Registration, Account Information, Direct Deposit, Grades, Transcripts, Financial Aid, Short-term/Book Loans) and Employees (Faculty/Advisor Functions, Electronic Personnel Action Form, Employee Information, Payroll (as of 1/1/2011), Leave Reporting, Finance/Budget Information).

2. In the Main Menu screen, choose “**Finance**”



The screenshot shows the Main Menu screen in mySFA. At the top, there are navigation tabs: Personal Information, Student, Financial Aid, Employee, and Finance (selected). Below the tabs, there is a search bar and a Go button. To the right, there are links for ACCESSIBILITY, SITE MAP, and HELP. The main content area lists several services: JackText, Personal Information, Student, Financial Aid, Employee, and Finance. The Finance link is highlighted with a red arrow. Below the list, there are links for [ Delete Finance Template | Antivirus Download | SASS Download ].

3. In the Finance Menu, choose “**Budget Transfer**”

Personal Information Student Financial Aid Employee **Finance**

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#)

## Finance

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- [Budget Queries](#)
- [Encumbrance Query](#)
- [Approve Documents](#)
- [View Document](#)
- [Budget Transfer](#)
- [Multiple Line Budget Transfer](#)
- [Budget Development](#)
- [Delete Finance Template](#)

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[ [Budget Queries](#) | [Encumbrance Query](#) | [Approve Documents](#) | [View Document](#) | [Budget Transfer](#) | [Multiple Line Budget Transfer](#) | [Budget Development](#) | [Delete Finance Template](#) ]



**RELEASE: 8.6**

4. Begin entering your Budget Transfer data. We will use the \$1,000 recognition of revenue to increase O&M budget as an example in the screen shot below.

- Transaction Date: Automatically defaults to today's date
- Journal Type: BDR
- Transfer Amount: Desired transfer amount
- Enter “From” and “To” information (see detail below)
- Description: Brief description of the reason for the transfer (i.e. Recognize overrealized income or increase budget to reflect actuals)
- Budget Period: 01
- Enter Template Name to save as a template, if desired.
- Do not check “Shared”
- Click “Complete”

## Budget Transfer

Begin by creating a budget transfer or retrieving an existing template. If available budget exists, budget can be transferred from only one set of accounting elements to another within the same chart.

Choose Complete to perform a validation and forward the document for processing.

Use Code Lookup to query a list of available values.

Use template

Transaction Date

Journal Type

Transfer Amount

Document Amount 0.00

	Chart	Index	Fund	Organization	Account	Program	Activity	Location	D/C
From	S		150010	XXXXX	55000	100			-
To			150010	XXXXX	7280	100			+
Description	Recognize overrealized income		Budget Period		01				

Save as Template

Shared

**Code Lookup**

Chart of Accounts Code

Type

Code Criteria

Title Criteria

Maximum rows to return

Always 01

- Enter "S" in the "Chart" field
- Enter Fund, Org, and Revenue Account Code (5XXXX). Program should be the default for that Fund & Org.
- Leave "Activity" & "Location" fields blank

- Enter Fund, Org, Account, and Program you wish to transfer "to"
- Leave "Activity" & "Location" fields blank

- Once the transfer is complete, a message should appear at the top of the screen that reads "Document JXXXXXXX completed and forwarded to the approval process"
  - If you do not see this message, your transfer has not been completed.