

Budget Office Training

My Finance Self-Service

Multiple Line Budget Transfer
(Budget Change or BDo4)

Multiple Line Budget Transfers: Correct Ways to Use

- * Purpose: Allows you to submit a **budget** change to move **Accounted Budget** amounts. You will see it in the **Accounted Budget** column.
- * Other names: Budget Change or BD04
- * This function can **only be used** to move **budgeted** funds:

1. Within the SAME org number.

Example: From Org 123456/Fund 12345/Account Code 7000-Operating
To Org 123456/Fund 12345/Account Code 8100-Equipment

2. Between 2 different orgs that have the **same 5-digit Fund Number**.

Example: From Org 123456/Fund 12345/Account Code 7000-Operating
To Org 654321/Fund 12345/Account Code 7000-Operating

-If the 2 orgs have a **different fund number**, you **cannot** use a Multiple Line Budget Transfer.

My UAH



myUAH

Home

Student Affairs

Academics

Home

Home Community / Home

Mode of Instru

The University reserves of instruction at any time other guidance. This cou remote or online classes provision of University s or online basis, as pract guarantee or promise to instruction, or experienc semester. The Universit a change in the mode of other instruction or expe

Employee Services

Huron UAH Enrollment Management Plan (Final-Revised 12-5-13)

Self Service Main Pages

Employee

Finance

Personal Information

Payroll Self Service

Timesheets

Pay Stubs

Leave Balances

Human Resources

HR Connection

New Employee Training

From the UAH webpage, log in to My UAH. Scroll down to Employee Services on the far right of the screen. Select Finance from Self Service Main Pages.

Banner Self-Service Main Screen

THE UNIVERSITY OF ALABAMA IN HUNTSVILLE

Please Note: User IDs, passwords, and security question answers are all case-sensitive.

[Enter Secure Area](#)
[Prospective Students](#)
[Apply for Admission](#)
[Class Schedule](#)
[Course Catalog](#)
[Transfer Credit Equivalency Table](#)
[Proxy Access Login](#)

RELEASE: 8.9.1.5

Personal Information **Student** **Employee** **Finance** **Proxy Menu**

Search

Main Menu

- Personal Information**
Update contact information or marital status; review name or social security number change information; Change your PIN.
- Student & Financial Aid**
Apply for Admission, Register, View your academic records and Financial Aid
- Employee**
Time sheets, time off, benefits, leave or job data, paystubs, W2 forms, W4 data. Customize a web module, web rules, WebTailor parameters.
- Finance**
Create or review financial documents, budget information, approvals.
- Module Planner**
perfect class schedule.
- Planner Registration Cart**
- Menu**

affiliates.

1. Select Enter Secure Area.
2. Select the Finance Tab.
3. Select Multiple Line Budget Transfer

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Personal Information **Student** **Employee** **Finance** **Proxy Menu**

Search

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Finance

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- [Encumbrance Query](#)
- [Requisition](#)
- [Approve Documents](#)
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- [Multiple Line Budget Transfers](#)
- [Budget Development](#)
- [e~Print Repository](#)
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[[Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#) | [Multiple Line Budget Transfers](#) | [Budget Development](#) | [e~Print Repository](#) | [ARRA Certification](#)]

Multiple Line Budget Transfer Form



Personal Information Student Employee **Finance** Proxy Menu

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Multiple Line Budget Transfer Form

Begin by creating a multiple line budget transfer or retrieving an existing template. If available budget exists, budget can be transferred. 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
Document Amount

#	Chart	Index	Fund	Organization	Account	Program	Activity	Location	Amount	D/C
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	-
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	+

Description Budget Period

Save as Template
 Shared

Instructions:

1. Transaction date will auto-populate to current date.
2. Journal Type defaults to BD04 (Temporary Budget Adjustment).
3. **'Document Amount'** will equal the absolute value of all entries.

*In the upcoming example, if you subtract \$5,000 from 235411-7801 and add \$5,000 to 235411-7000, the **'Document Amount'** will be \$10,000.

Note: Do NOT insert Dollar Sign or Commas for the dollar amounts-only numbers.

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Transaction Date

Journal Type

Document Amount

#	Chart	Index	Fund	Organization	Account	Program	Activity	Location	Amount	D/C
1	H	235411			7801				5000	-
2	H	235411			7000				5000	+
3										+
4										+
5										+

Description Budget Period

Save as Template

Shared

Instructions:

4. Enter 'H' for Chart of Accounts.
5. Enter the 6-digit 'Index' in each of the boxes.
6. Enter the 4-digit 'Account Code' that you are reducing (Minus '-' sign is auto-populated) on the first line, the 'Amount'.
7. Enter the 4-digit 'Account Code' that you are increasing (the '+' sign will be auto-populated under 'D/C') on the second line with the 'Amount'.
8. Repeat as needed making sure that total increases equal total decreases.
9. Add a brief 'Description'.
10. Add the appropriate 'Budget Period' for the Transaction Date (i.e. 1=October, 2=November, 3=December, etc.)

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Transaction Date:
 Journal Type:
 Document Amount:

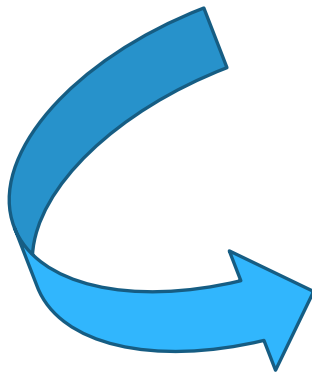
#	Chart	Index	Fund	Organization	Account	Program	Activity	Location	Amount	D/C
1	H	235411			7801				5000	-
2	H	235411			7000				5000	+
3										+
4										+
5										+

Description: Budget Period:

Save as Template:
 Shared
 

Instructions:

- Once all items have been entered, click **'Complete'**.
- If entered correctly, **4 things** should happen:
 - The **'Index'** number will move to the Organization field.
 - The Default **'Fund Number'** will auto-populate.
 - The **'Account Codes'** will disappear.
 - The Default **'Program Codes'** will auto-populate.



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Transaction Date:
 Journal Type:
 Document Amount:

#	Chart	Index	Fund	Organization	Account	Program	Activity	Location	Amount	D/C
1	H		19200	235411		20			5000	-
2	H		19200	235411		20			5000	+
3										+
4										+
5										+

Description: Budget Period:

Save as Template:
 Shared

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 Journal Type:
 Document Amount:

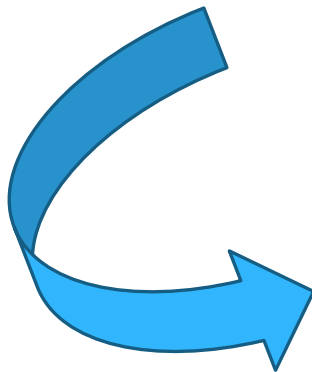
#	Chart	Index	Fund	Organization	Account	Program	Activity	Location	Amount	D/C
1	H	235411			7801				5000	-
2	H	235411			7000				5000	+
3										+
4										+
5										+

Description: Budget Period:

Save as Template:
 Shared

Instructions:

- Re-enter the appropriate 'Account' codes.
- Click 'Complete' again.
- If the entry is accepted, an 8-digit Journal Entry Number (Jxxxxxxx) at the top of the screen.
- You can then find the entry in View Document or 'Pending Documents' in the Budget Query.



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1	H		19200	235411	7801	20			5000	-
2	H		19200	235411	7000	20			5000	+
3										+
4										+
5										+

Description: Budget Period:

Save as Template:
 Shared

Multiple Line Budget Transfer Common Errors

- **Insufficient Budget** – The Org/Fund/Account code that you are trying to decrease does not have sufficient funds to process the transaction. Check the budget on that line to make sure there is enough money in the specific account code you are trying to decrease. Also, check ‘Pending Documents’ on the Org that could be causing the error.
- The ‘**Budget Status by Organizational Hierarchy**’ query is a good way to quickly identify if there is a deficit in an account code series. Refer to <https://www.uah.edu/budget/self-service-help>
- **Insufficient Privileges** – If you receive this error, you are not authorized to ‘Post’ on the specified Org # or #s. You may need to request access from the Budget Office via the Banner Self-Service Request form. <https://www.uah.edu/budget/forms>

Please note:

If you contact the Budget Office to report a problem, please email a screenshot of the error (Ctrl + Print Screen).

Questions?



Contact us!

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