

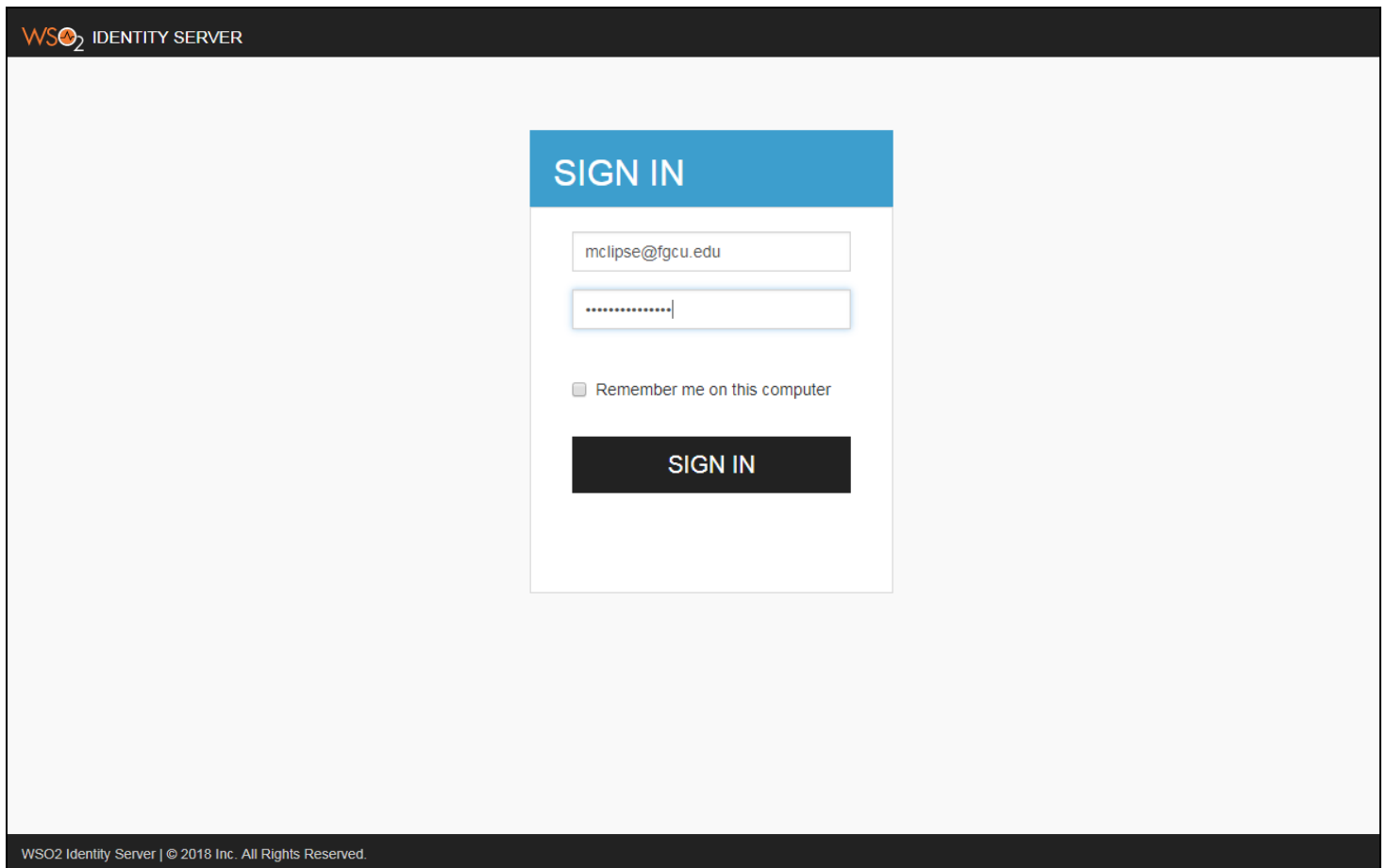
**Online
Budget Transfers
Using Banner 9**

**Florida Gulf Coast University
Budget Office**

How to process budget transfers

1. Logging on: <http://banner.fgcu.edu/>

Click on Production FGPO



WSO₂ IDENTITY SERVER

SIGN IN

mclipse@fgcu.edu

.....

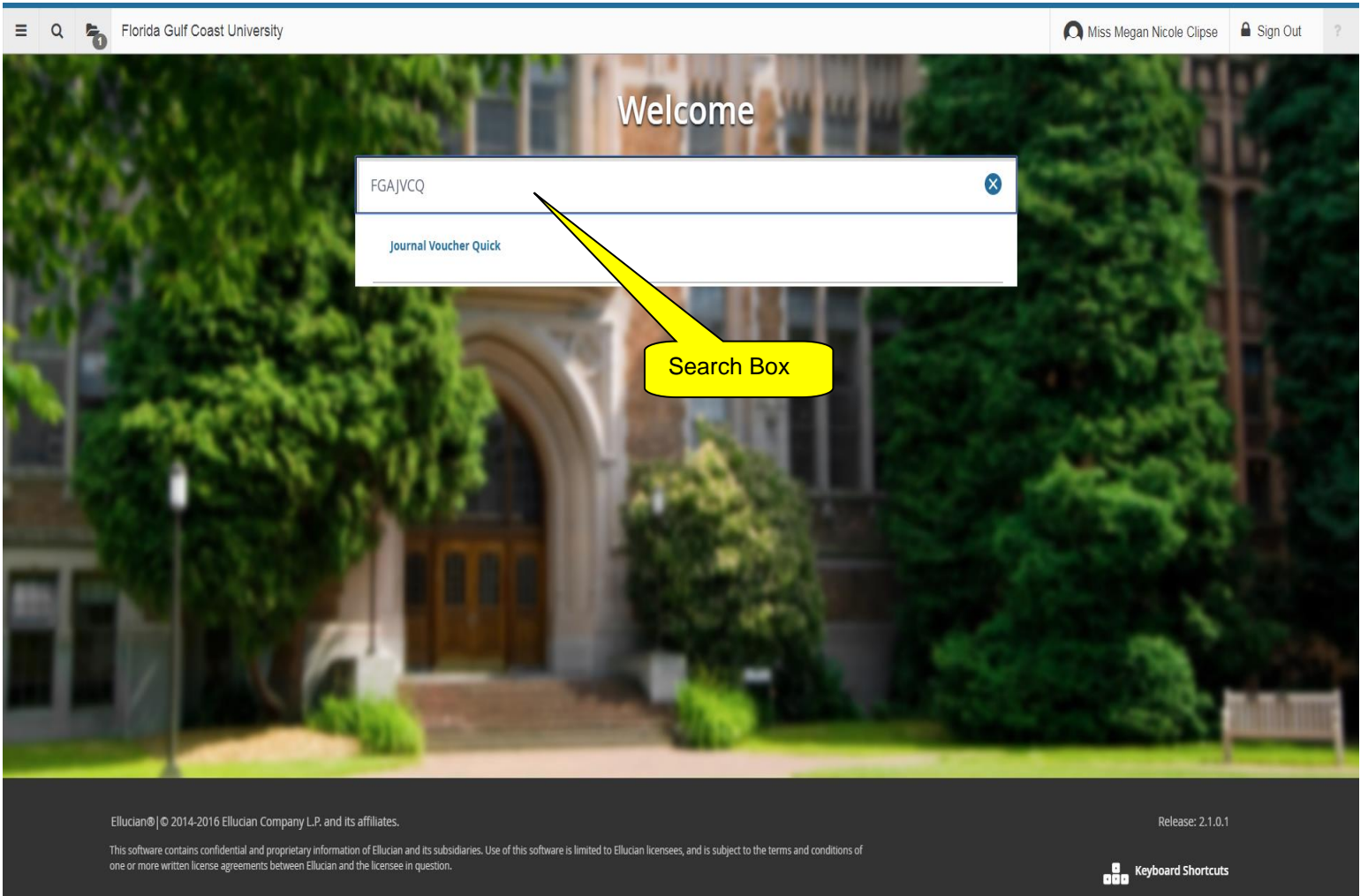
Remember me on this computer

SIGN IN

WSO2 Identity Server | © 2018 Inc. All Rights Reserved.

2. Input your username (including the @fgcu.edu) and password

3. In the **SEARCH BOX**, please put in **FGAJVCQ** or **“Budget Transfers”**



The screenshot shows the Florida Gulf Coast University website interface. At the top, the header includes the university name, a search icon, and user information for Miss Megan Nicole Clipse. The main content area features a 'Welcome' message and a search box containing the text 'FGAJVCQ'. A dropdown menu is visible below the search box, showing the option 'Journal Voucher Quick'. A yellow callout box with the text 'Search Box' points to the search input field. The background of the page is a photograph of a university building entrance.

Florida Gulf Coast University

Miss Megan Nicole Clipse Sign Out ?

Welcome

FGAJVCQ

Journal Voucher Quick

Search Box

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Keyboard Shortcuts

4. Click **GO** or **Next Section (Alt + PgDn)** to generate a JV.

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Journal Voucher Quick FGJ/VCO 9.3.6 (FGTR)

ADD RETRIEVE RELATED TOOLS

Document Number: Copy

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

EDIT Record: 1/1 KEY_BLOCK.DOCUMENT_NUMBER [1] ellucian

Go button

Next Section

Florida Gulf Coast University

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Journal Voucher Quick FGJ/VCO 9.3.6 (FGTR)

ADD RETRIEVE RELATED TOOLS

Document Number: Copy

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

EDIT Record: 1/1 KEY_BLOCK.DOCUMENT_NUMBER [1] ellucian

5. Hit **Tab** to **Document total** and type the amount you wish to transfer. This amount is the result of adding the decreasing total to the increasing total.

Example: If you want to move \$200 from one account to another one, your document total should be \$400. You will be taking \$200 from one account and increasing \$200 in another account.

Florida Gulf Coast University

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Journal Voucher Quick FGJ/VCO 9.3.6 (FGTR)

ADD RETRIEVE RELATED TOOLS

Document Number: Copy

Go

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

EDIT Record: 1/1 KEY_BLOCK.DOCUMENT_NUMBER [1] ellucian

JOURNAL VOUCHER QUICK

Transaction Date * 04/18/2018

Document Total 400

NSF Checking

Deferred Edit

Document Text Exists

Then hit **Next Section**.

6. Hit tab to go over to Journal Type
 - a. Type **BD2** if you are doing a **permanent** adjustment
 - b. Type **BD4** if you are doing a **temporary** adjustment

Florida Gulf Coast University		Miss Megan Nicole Clipse		Sign Out	?	
Journal Voucher Quick FGAJVCQ 9.3.6 (FGTR)			ADD	RETRIEVE	RELATED	TOOLS
Document Number: J0074598					Start Over	
TRANSACTION TOTAL						
Document Total		400.00		Document Number		J0074598
JOURNAL VOUCHER DETAIL						
Status	Postable		Sequence	1		Journal Type * BD04 ... Temporary Budget Adjustment
Chart *	L ... Florida Gulf Coast University		Activity	...		
Index	200900 ... Budget Office		Location	...		
Fund	10001 ... General Revenue Approp		Project	...		
Organization	200900 ... Budget Office					
Account	6200 ... Temporary Employment - Pool Acct					
Program	61 ... General Administration					
Percent			Description *	To fund travel costs		Gift Date
Amount *	200.00		Bank	AP ...		Number of Units
Debit/Credit	- Minus		Budget Period	10		
	<input type="checkbox"/> NSF Override		Currency	...		
1 of 2		1 Per Page		Record 1 of 2		
COMPLETION						
Complete		In Process				

7. Continue completing the form as indicated. After inputting the corresponding Budget period; hit the down arrow on your key board.

8. Tab down to Journal Type and complete the form as indicated. OR click “Copy” to duplicate your previous entry

Florida Gulf Coast University

Miss Megan Nicole Clipse Sign Out

Journal Voucher Quick FGAJVCQ 9.3.6 (FGTR)

Document Number: J0074598

Document Total 400.00 Document Number J0074598

Journal Type * BD04 ... Temporary Budget Adjustment

Chart * L ... Florida Gulf Coast University

Index 200900 ... Budget Office

Fund 10001 ... General Revenue Approp

Organization 200900 ... Budget Office

Account 7300T ... Travel Pool Account

Program 61 ... General Administration

Description * To fund travel costs

Amount * 200.00

Bank AP ...

Budget Period 10

Currency | ...

Gift Date

Number of Units

Copy option

Record 2 of 2

Completion: Complete In Process

9. If this is your last transaction, click **NEXT SECTION** at the bottom of the screen, and click on “Complete”.

10. After hitting complete, the transfer will go through. If you get something like this in the top right of the screen your transaction was successfully completed:

Florida Gulf Coast University

Miss Megan Nicole Clipse Sign Out ?

Journal Voucher Quick FGAJVCQ 9.3.6 (FGTR)

Document Number: ... Copy

ADD RETRIEVE RELATED TOOLS 1

Document J0074599 completed and forwarded to the posting process.

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

EDIT Record: 1/1 KEY_BLOCK.DOCUMENT_NUMBER [1] ellucian

Rules

- You cannot transfer fund in or out of the following pools:
 - 7300C Charge back pool
 - 6100 Salaries and benefits
 - Revenue
- You cannot transfer funds from one fund to another.
You can only transfer funds within you own fund/org.
- You cannot transfer budget in or out of grant funds (funds starting With 20 or 21)
- Use BD2 for permanent transfers and BD4 for temporary transfers
- All incomplete JVs will be deleted at the end of the day.