Banner Finance Self Service (SSB) - Training Guide: Budget Procedures

Banner Finance Self Service Training Guide: Budget Procedures

TABLE OF CONTENTS

General Information:

Purpose: This document provides step-by-step instructions for running budget reports and entering budget adjustments in Banner Finance Self-Service (SSB). It is intended for end users responsible for monitoring budgets and submitting budget adjustments.

Any questions may be sent to bannerhotline@odu.edu.

Banner Finance Self Service Training Guide: Budget Procedures

Accessing Banner Finance Self-Service

1. Go to *LeoOnline*: https://www.odu.edu/administrative-banner-systems/leo-online.
2. Navigate to *Finance Self-Service*. Use your Midas Credentials to login.
3. Open the *My Finance Dashboard*.
- **NOTE**: For more information about logging into the system, please view our guide here: https://www.odu.edu/sites/default/files/2026/documents/ssb-login.pdf.
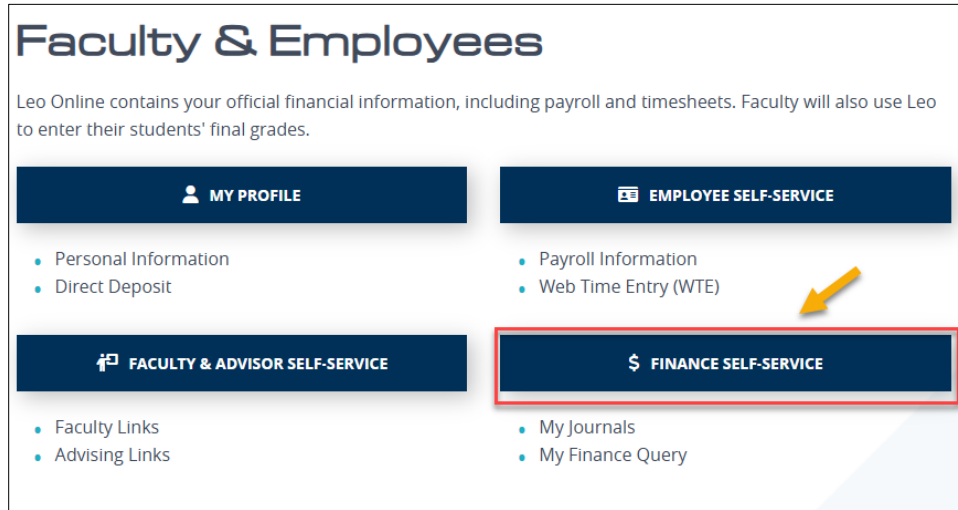
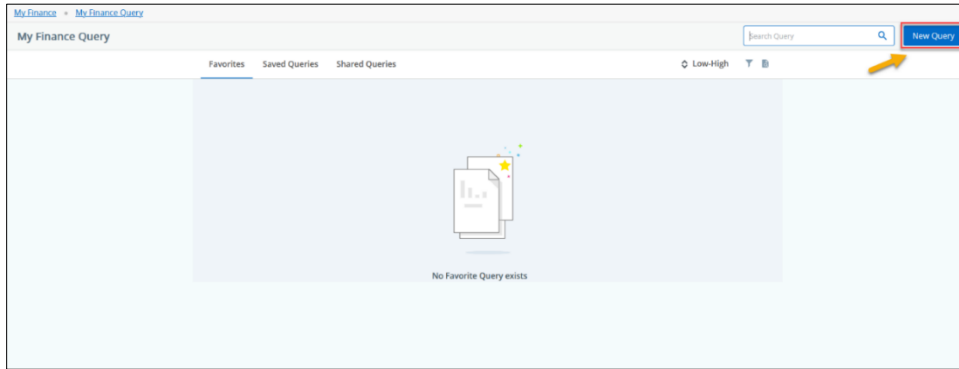### Running Budget Queries in Banner Finance Self-Service

Budget Status by Organizational Hierarchy:
This query provides a high-level summary of budget activity by organization.
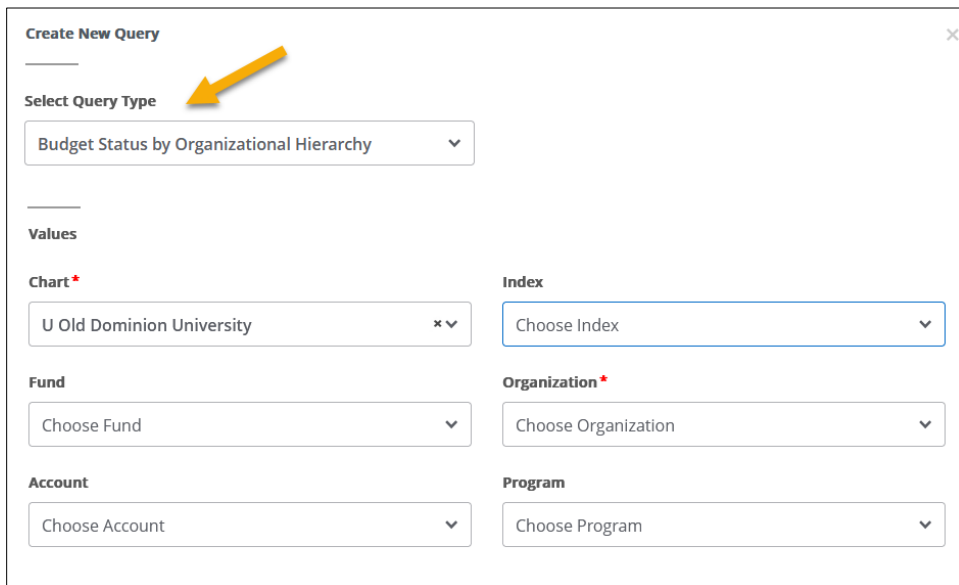
1. From the **My Finance Dashboard**, select **My Finance Query**.
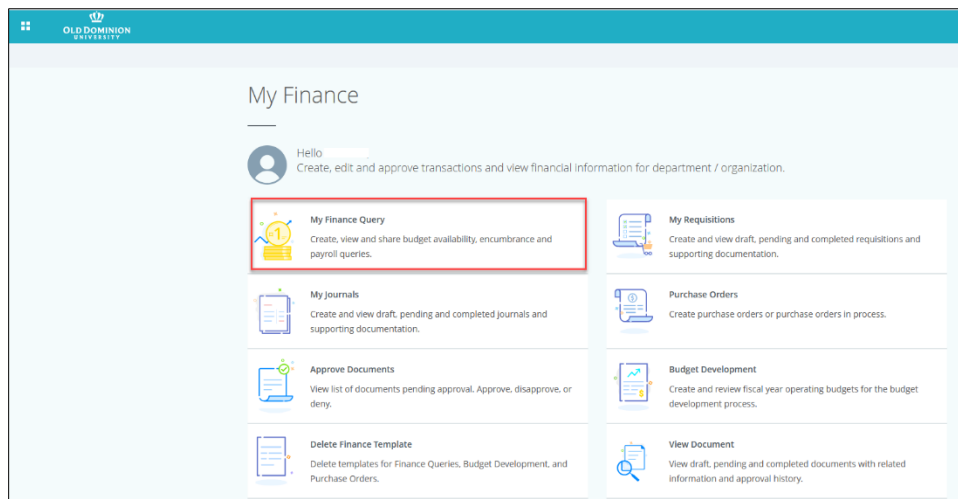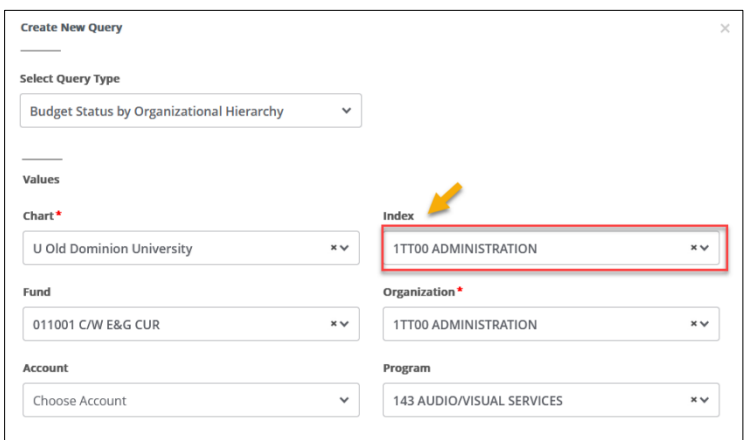
2. Select **New Query**.

3. From the **Select Query Type** drop-down menu, choose **Budget Status by Organizational Hierarchy**.
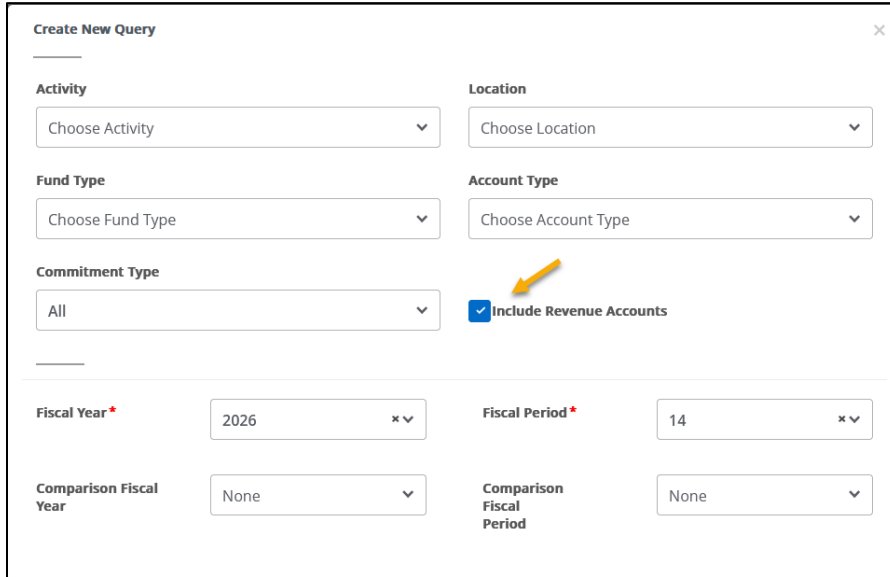

4. Enter the **Organization Code** in the **Index field**.
   - Entering the Index Code will automatically populate the default Fund, Organization, and Program values.
   - The Account and Fund Type fields may be left blank.

5. Check **"Include Revenue Accounts"** box for fee/revenue supported budgets.

6. Enter the **4-digit Fiscal Year** and **2-digit Fiscal Period**.

7. **Period 14** should always be used to ensure all budget adjustments and year-to-date actuals are captured in the query.

8. In the **Operating Ledger** section, select the following options:
   - Adopted Budget
   - Budget Adjustments
   - Adjusted Budget
   - Year to Date
   - Commitments
   - Available Balance

Create New Query

Year | None ▼ | Fiscal Period | None ▼

Operating Ledger

☑ Adopted Budget ⓘ   ☑ Year to Date ⓘ

☑ Budget Adjustment ⓘ   ☐ Encumbrance ⓘ

☑ Adjusted Budget ⓘ   ☐ Reservation ⓘ

☐ Temporary Budget ⓘ   ☑ Commitments ⓘ

☐ Accounted Budget ⓘ   ☑ Available Balance ⓘ

SUBMIT

9. Select **Submit** at the bottom of the screen.

Create New Query

Year | None ▼ | Fiscal Period | None ▼

Operating Ledger

☑ Adopted Budget ⓘ   ☑ Year to Date ⓘ

☑ Budget Adjustment ⓘ   ☐ Encumbrance ⓘ

☑ Adjusted Budget ⓘ   ☐ Reservation ⓘ

☐ Temporary Budget ⓘ   ☑ Commitments ⓘ

☐ Accounted Budget ⓘ   ☑ Available Balance ⓘ

SUBMIT

Results and Navigation

- A **Summary Budget Report** will be generated.

My Finance · My Finance Query · Budget Status by Organizational Hierarchy							New Query

Budget Status by Organizational Hierarchy

‹ ADMINISTRATION - 1TT00

Query Results

Organization ◇	Organization Title ◇	FY26/PD14 Adopted Budget ◇	FY26/PD14 Budget Adjustment ◇	FY26/PD14 Adjusted Budget ◇	FY26/PD14 Year to Date ◇	FY26/PD14 Commitments ◇	FY26/PD14 Available Balance ◇
1TT00	ADMINISTRATION	$6,453,172.00	$285,204.00	$6,738,376.00	$951,876.85	$515,830.42	$5,270,668.73
Report Total (of all records)		$6,453,172.00	$285,204.00	$6,738,376.00	$951,876.85	$515,830.42	$5,270,668.73

- Text displayed in **blue** indicates drill-down capability for additional detail.

- Click the **Organization Code** to view a summary by expenditure category.

Organization	Organization Title	FY26/PD14 Adopted Budget	FY26/PD14 Budget Adjustment	FY26/PD14 Adjusted Budget	FY26/PD14 Year to Date	FY26/PD14 Commitments	FY26/PD14 Available Balance
1TT00	ADMINISTRATION	$6,453,172.00	$285,204.00	$6,738,376.00	$951,876.85	$515,830.42	$5,270,668.73
Report Total (of all records)		$6,453,172.00	$285,204.00	$6,738,376.00	$951,876.85	$515,830.42	$5,270,668.73

- Click on **Account Type** to view more detailed account-level information.

Account Type	Account Type Title	FY26/PD14 Adopted Budget	FY26/PD14 Budget Adjustment	FY26/PD14 Adjusted Budget	FY26/PD14 Year to Date	FY26/PD14 Commitments	FY26/PD14 Available Balance
60	PERSONAL SERVICES						
70	NON-PERSONAL SERVICES						
Report Total (of all records)							

Account Type	Account Type Title	FY26/PD14 Adopted Budget	FY26/PD14 Budget Adjustment	FY26/PD14 Adjusted Budget	FY26/PD14 Year to Date	FY26/PD14 Commitments	FY26/PD14 Available Balance
71	NON PERSONAL SERVICES	$2,686,534.00	($36,650.00)	$2,649,884.00	$104,444.54	$515,830.42	$2,029,609.04
72	TRAVEL	$30,000.00	$0.00	$30,000.00	$1,926.56	$0.00	$28,073.44
79	EQUIPMENT	$0.00	$0.00	$0.00	$1,653.08	$0.00	($1,653.08)
Report Total (of all records)		$2,716,534.00	($36,650.00)	$2,679,884.00	$108,024.18	$515,830.42	$2,056,029.40

- Click on **Budget Amounts** in report to view a list of transactions.

Account	Account Title	FY26/PD14 Adopted Budget	FY26/PD14 Budget Adjustment	FY26/PD14 Adjusted Budget	FY26/PD14 Year to Date	FY26/PD14 Commitments	FY26/PD14 Available Balance
9028	OTHER COMPUTER EQUIP $2,000-$4,999	$0.00	$0.00	$0.00	$1,653.08	$0.00	($1,653.08)
9201	ELECTRONIC EQUIP <$4,999	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Report Total (of all records)		$0.00	$0.00	$0.00	$1,653.08	$0.00	($1,653.08)

=

- A list of all the transactions that make up that total will be displayed (FGITRND).

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
08/13/2025	08/13/2025	PC000040	SPCC-SILVERTHORNE-B&H PHOTO MOTO	$1,653.08	JE16
Report Total (of all records)				$1,653.08	

- Select any section in the blue titles in the top-right corner of the screen to exit or Select **New Query** to run another report.

| Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
08/13/2025	08/13/2025	PC000040	SPCC-SILVERTHORNE-B&H PHOTO MOTO	$1,653.08	JE16
Report Total (of all records)				$1,653.08	

Budget Status by Account (FGIBDST / FGIBDSR)

This query provides detailed balances for both transactional account codes and budget pool accounts.
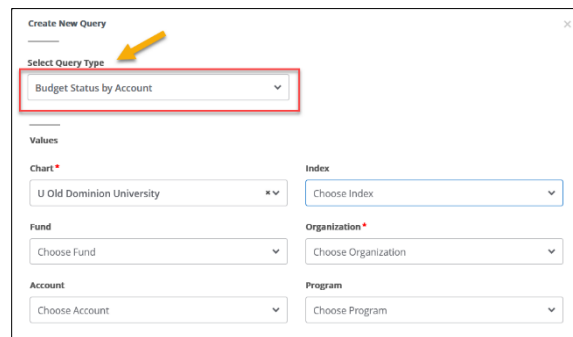
1. From the **My Finance Dashboard**, select **My Finance Query**.
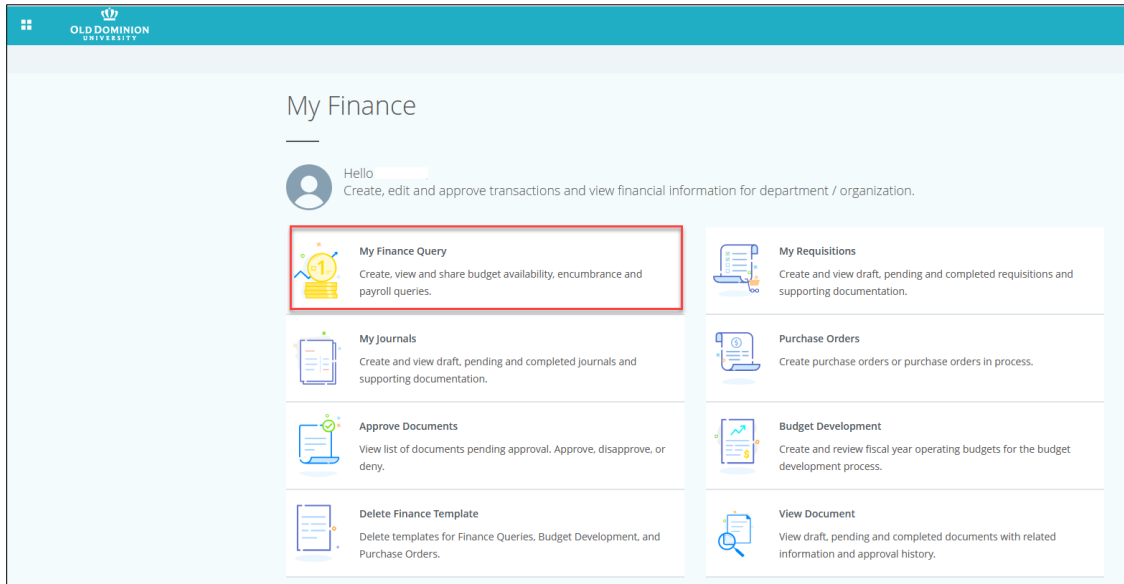
2. Select **New Query**.
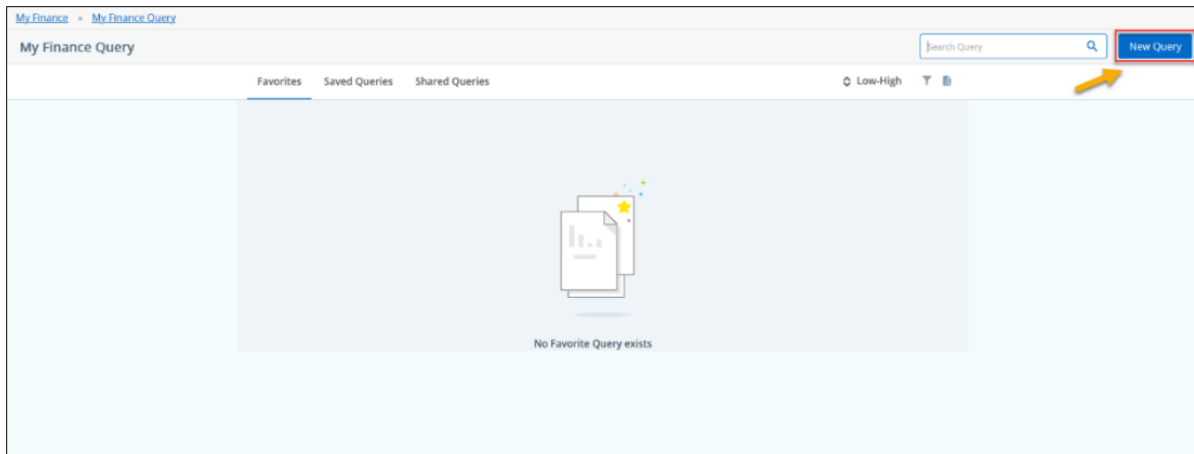
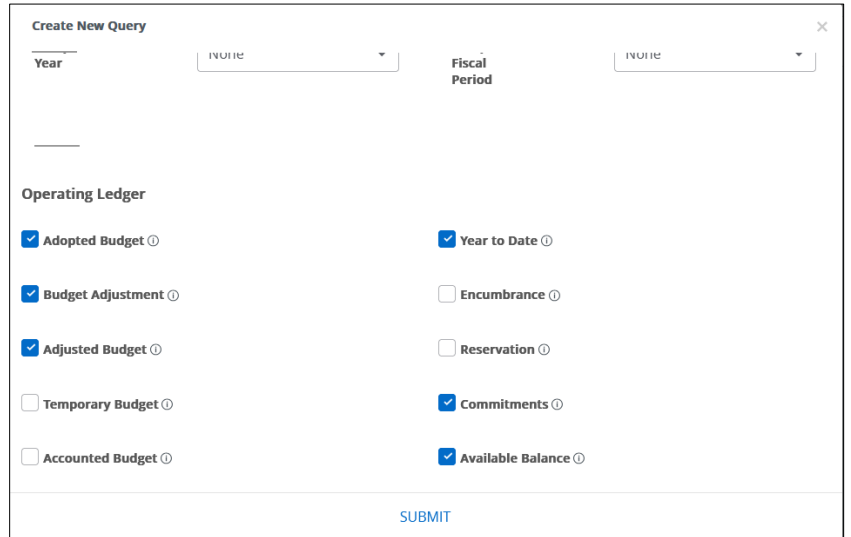3. From the **Select Query Type** drop-down menu, choose **Budget Status by Account**.

4. Enter the **Organization Code** in the **Index field**.
   - The **Fund**, **Organization,** and **Program** fields will auto-populate.
   - The Account and Fund Type fields may be left blank.

5. Check **"Include Revenue Accounts"** box for fee/revenue supported budgets.

6. Enter the **4-digit Fiscal Year** and **2-digit Fiscal Period**.

7. **Period 14** should always be used to ensure all budget adjustments and year-to-date actuals are captured in the query.

8. In the **Operating Ledger** section, select:
   - Adopted Budget
   - Budget Adjustments
   - Adjusted Budget
   - Year to Date
   - Commitments
   - Available Balance

9. Select **Submit** at the bottom of the screen.

Results and Navigation

- A **Detailed Budget Report** will be generated.

- Blue text indicates links to additional budget detail.

- A list of all the transactions that make up that total will be displayed (FGITRND).

Exiting a Query

- Select any blue report title in the top-right corner of the screen, or
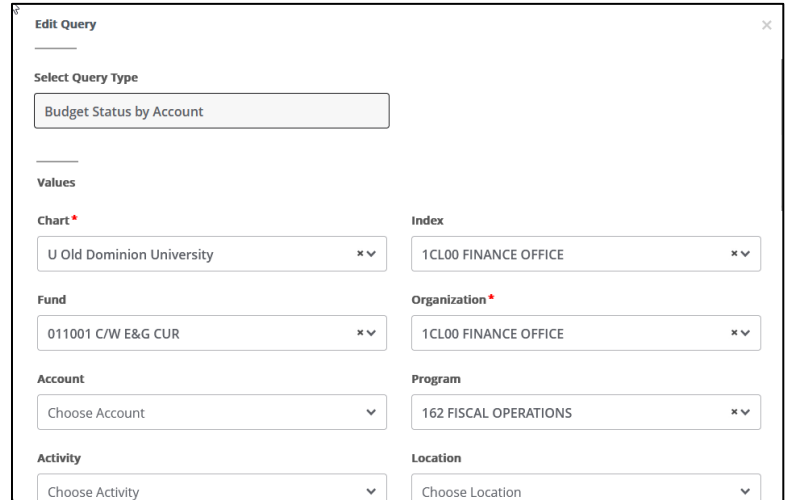- Select New Query to run another report.

My Finance Queries: Navigation Tools

Once a query report is generated, several navigation tools are available within the query. These tools allow users to **review query parameters**, **edit query settings**, **save queries**, and **manage saved reports**. All navigation tools are displayed in the **Query Title Bar**.
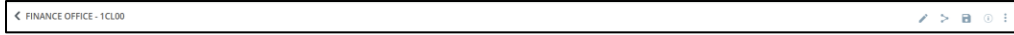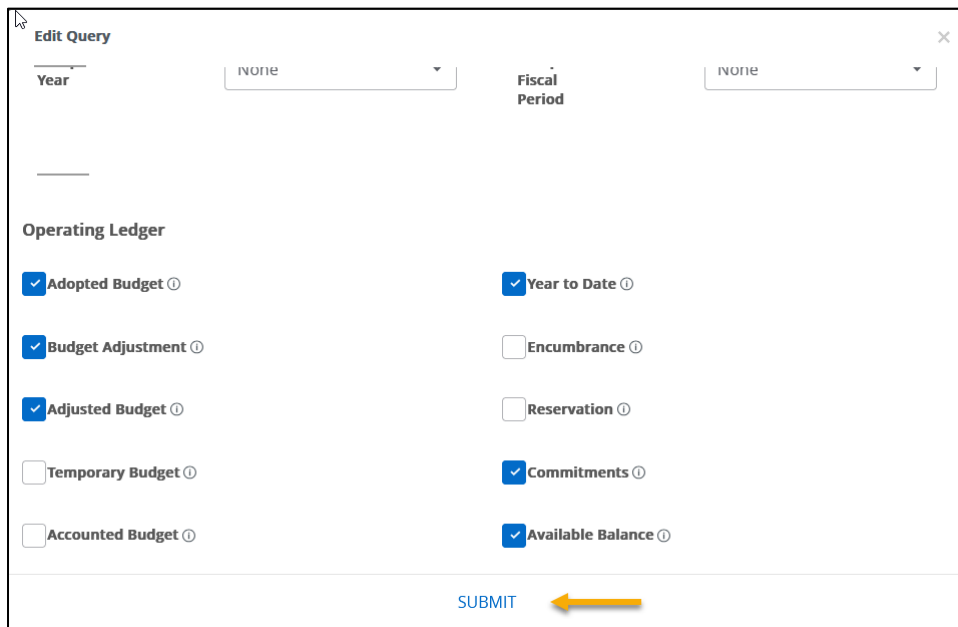

To Edit Query Parameters:

1. Select the **pencil icon** from the Query Title Bar.
2. The **Edit Query** screen will open, allowing updates to the parameter selections.

3. After making changes, click **Submit** at the bottom of the Edit Query screen.

4. The report will regenerate using the updated parameters.

To View Query Parameters

1. Select the **information icon** in the Query Title Bar.
2. The **View Query Parameters** screen will appear, displaying:
   o Query type
   o Beginning and ending period
   o All selected parameter values
3. Select **OK** to return to the report.

To Save a Query

1. Select the **Save icon** from the Query Title Bar.
2. Enter a **Query Name** in the *Save As* field.

3. Click **Save**.

4. A confirmation message will appear in the top-right corner of the screen.

To view saved queries:
1. Select **My Finance Query** to return to the Query Dashboard.

2. Choose **Saved Queries**.
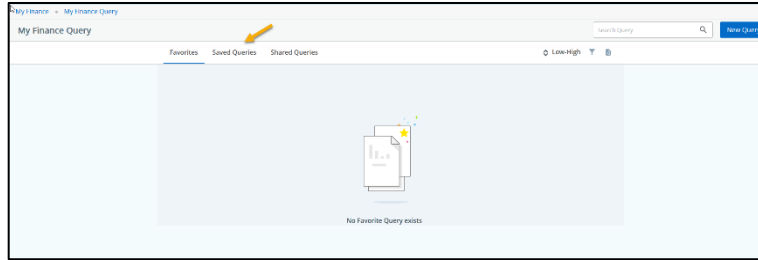
3. Thumbnails for all saved queries will appear.
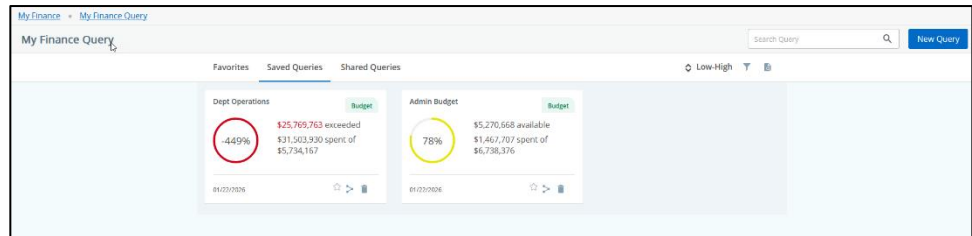
To mark a saved query as a favorite:

1. Select the **Star icon** at the bottom of a query thumbnail.

2. Click **Yes** to confirm.

3. A confirmation message will appear in the top-right corner of the screen.

4. The query thumbnail will now appear in the **Favorites** tab on the My Finance Query Dashboard.

Click any thumbnail to open the saved query report.

My Finance • My Finance Query • Budget Status by Account						

Budget Status by Account

‹ Dept Operations

Query Results

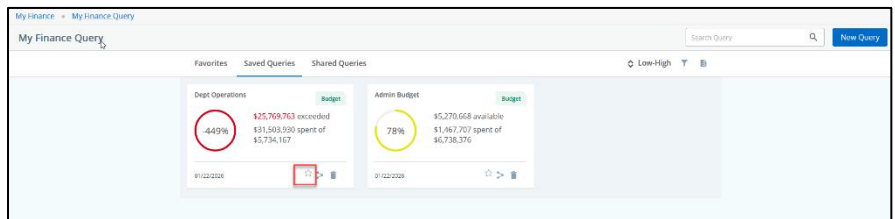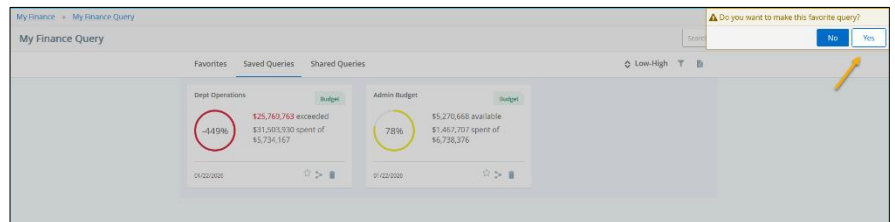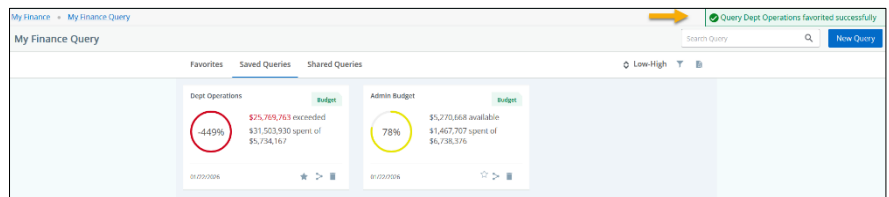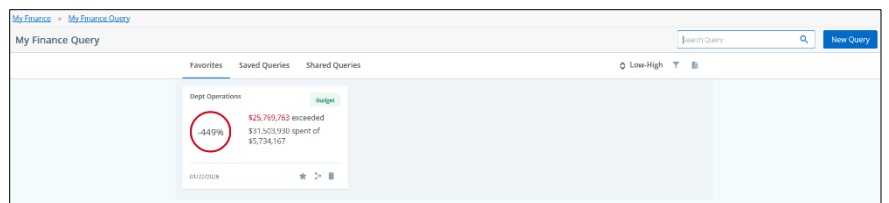| Account	Account Title	FY26/PD14 Adopted Budget	FY26/PD14 Budget Adjustment	FY26/PD14 Adjusted Budget	FY26/PD14 Year to Date	FY26/PD14 Commitments	FY26/PD14 Available Balance
4001	ADMINISTRATIVE SALARIES	$891,092.00	$0.00	$891,092.00	$208,103.92	$0.00	$682,988.08
4002	CLASSIFIED SALARIES	$2,911,863.00	$5,047.00	$2,916,910.00	$615,099.15	$0.00	$2,301,810.85
4007	SALARIES-ANNUAL LEAVE BAL	$0.00	$0.00	$0.00	$591.05	$0.00	($591.05)
4012	SALARY SAVINGS- HOLDING	($2,543.00)	$0.00	($2,543.00)	$0.00	$0.00	($2,543.00)
4021	WAGES - GENERAL	$52,902.00	$0.00	$52,902.00	$5,839.68	$0.00	$47,062.32
4025	STUDENT WAGES - W/O FICA	$3,000.00	$0.00	$3,000.00	$0.00	$0.00	$3,000.00
4036	BONUSES & INCENTIVES	$0.00	$0.00	$0.00	$3,675.00	$0.00	($3,675.00)
4041	MOBILE DEVICE ALLOWANCE	$0.00	$0.00	$0.00	$540.00	$0.00	($540.00)
4901	EMPLOYER RETIRE CONT-VRS DEF BEN	$0.00	$0.00	$0.00	$100,056.31	$0.00	($100,056.31)
4902	FOAI SALARIED STATE EMP	$0.00	$0.00	$0.00	$61,311.99	$0.00	($61,311.99)
4903	FOAI WAGE STATE EMPLOYEE	$0.00	$0.00	$0.00	$446.74	$0.00	($446.74)
4904	GROUP LIFE INSURANCE	$0.00	$0.00	$0.00	$9,430.24	$0.00	($9,430.24)
4905	HOSPITALIZATION INSURANCE	$0.00	$0.00	$0.00	$135,551.50	$0.00	($135,551.50)
Report Total (of all records)		**$5,731,524.00**	**$2,643.00**	**$5,734,167.00**	**$31,303,858.32**	**$200,072.23**	**($25,769,763.55)**

Budget Adjustment Journal Entries (My Journals)

Accessing My Journals

1. From the **My Finance Dashboard**, select **My Journals**.
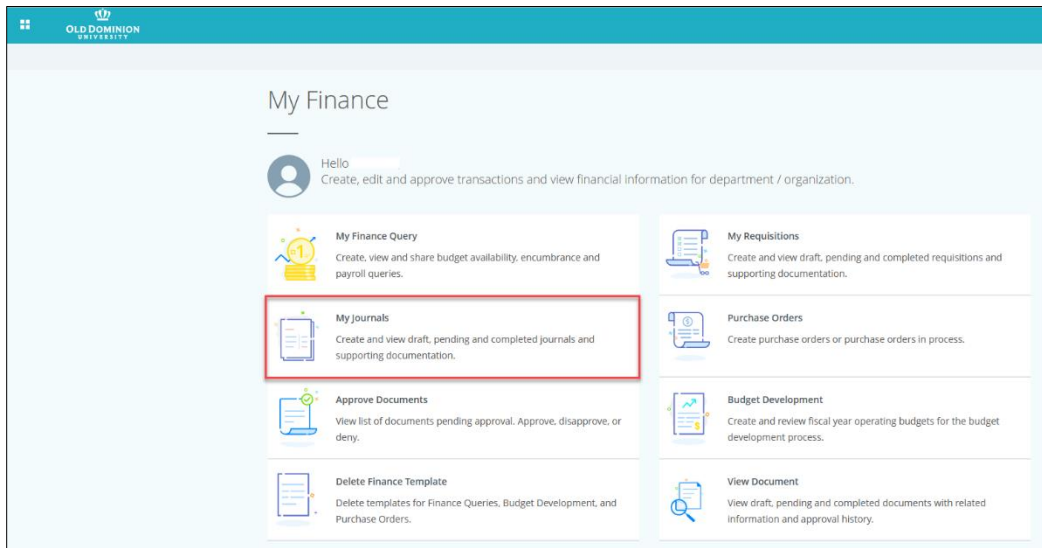
2. The My Journals Dashboard displays three journal categories:
   Draft Journals
   - Journals that have been created but not submitted.
   - This section should normally be empty.
   - Draft journals require action to either submit or delete.

   Pending Journals
   - Journals that have been submitted and are awaiting approval.
   - Review workflow status as needed to ensure timely approval.

Completed Journals

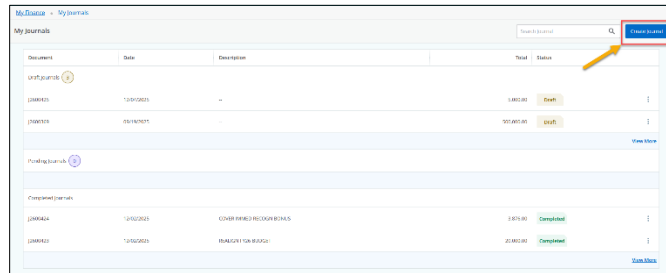- Journals that have been fully approved and posted.

Creating a Budget Adjustment Journal

1. Select **Create Journal**.

2. Enter the **Transaction Date**.
- This should always be the date the journal is entered.
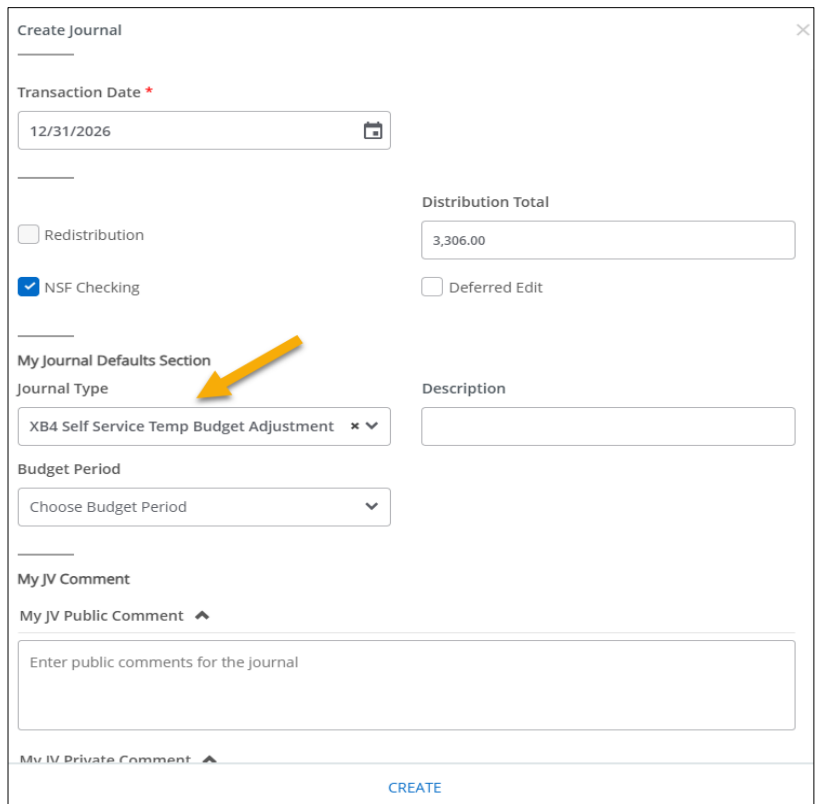
3. Enter the **Distribution Total**.
   - This is the hash total of all budget increases and decreases.
   - The total may be calculated by adding the absolute values of all increases and decreases.
   - NSF Checking should remain checked.
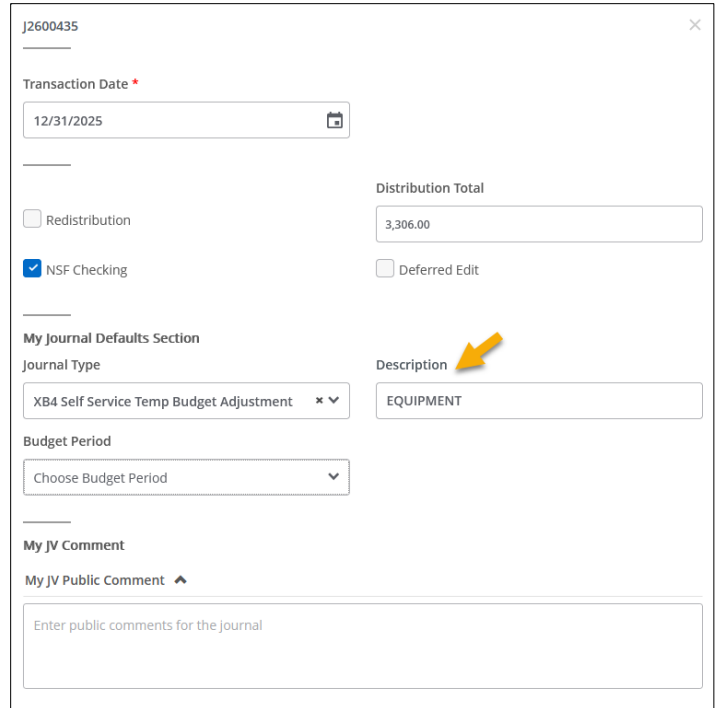
Create Journal

Transaction Date *

12/31/2026

Redistribution

☑ NSF Checking

Distribution Total

3,306.00

☐ Deferred Edit

My Journal Defaults Section

Journal Type

Choose Journal Type

Budget Period

Choose Budget Period

Description

My JV Comment

My JV Public Comment ⌃

Enter public comments for the journal

My JV Private Comment ⌃

CREATE

4. From the **Journal Type** drop-down menu, select **XB4 – Self Service Temp Budget Adjustment.**
   - This value may also be typed directly into the field.

Create Journal

Transaction Date *

12/31/2026

Redistribution

☑ NSF Checking

Distribution Total

3,306.00

☐ Deferred Edit

My Journal Defaults Section

Journal Type

XB4 Self Service Temp Budget Adjustment   × ⌄

Budget Period

Choose Budget Period

Description

My JV Comment

My JV Public Comment ⌃

Enter public comments for the journal

My JV Private Comment ⌃

CREATE

5. Enter a brief **Journal Description**.
   - This description will appear on each line description or can be left blank so that different descriptions can be entered for line within the adjustment.

J2600435   ×

Transaction Date *

12/31/2025

☐ Redistribution   Distribution Total

                                    3,306.00
☑ NSF Checking   ☐ Deferred Edit

My Journal Defaults Section

Journal Type   Description

XB4 Self Service Temp Budget Adjustment × ∨   EQUIPMENT

Budget Period

Choose Budget Period   ∨

My JV Comment

My JV Public Comment ∧

Enter public comments for the journal

6. For **Budget Period**, select **01**.
   - Period 01 must be used for all budget adjustments.

J2600435   ×

Transaction Date *

12/31/2025

☐ Redistribution   Distribution Total

                                    3,306.00
☑ NSF Checking   ☐ Deferred Edit

My Journal Defaults Section

Journal Type   Description

XB4 Self Service Temp Budget Adjustment × ∨   EQUIPMENT

Budget Period

01   × ∨

My JV Comment

My JV Public Comment ∧

Enter public comments for the journal
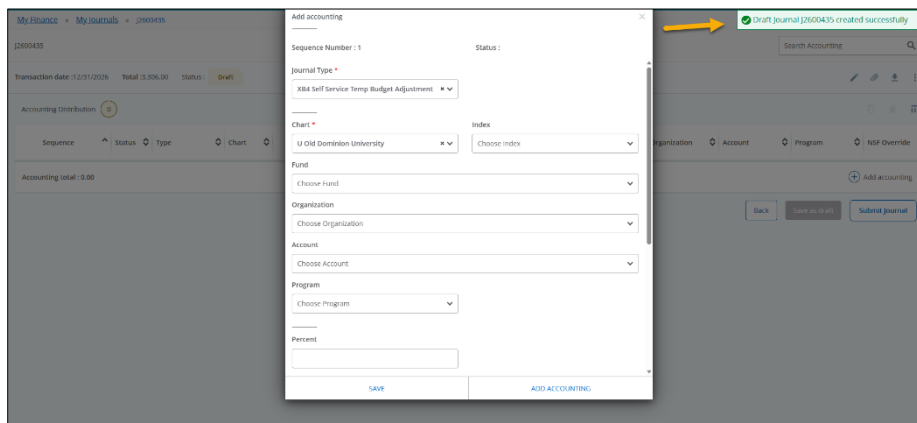
7. *Optional:* Enter information in **My JV Public Comment** or **My JV Private Comment,** to provide additional information pertaining to the adjustment.

8. Select **Create** to begin entering journal lines.

- A draft journal number will be assigned at this point.

Entering Budget Adjustment Lines

1. Enter or select the Index (Organization Code).
   - The **Fund**, **Organization**, and **Program** fields will auto-populate.

2. Enter or select the **Account Code**.

3. Enter the **Amount** as a whole number.

4. From the **Debit/Credit** drop-down menu, select:
   - **+ Plus** to increase the budget
   - **- Minus** to decrease the budget

Sequence Number : 1

Status :
Program

143 AUDIO/VISUAL SERVICES

Percent

Amount *   Debit/Credit *
1,653.00   - Minus   × ∨

                  Document Reference
NSF Override

Description *   Budget Period
EQUIPMENT   Choose Budget Period   ∨
Bank
50 TREASURER OF VIRGINIA × ∨   Accrual Indicator
Deposit   Currency
                  Choose Currency Code   ∨

SAVE   ADD ACCOUNTING

Sequence Number : 1

Status :
Program

143 AUDIO/VISUAL SERVICES

Percent

Amount *   Debit/Credit *
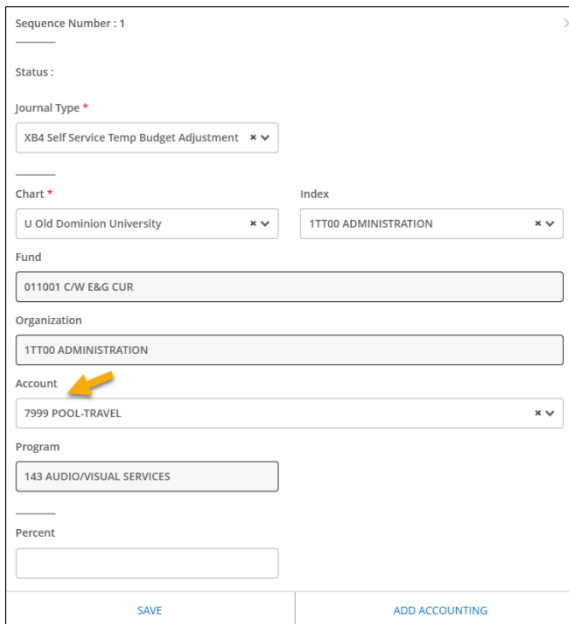1,653.00   - Minus   × ∨

                  Document Reference
NSF Override

Description *   Budget Period
TO COVER PHOTO EQUIP Choose Budget Period   ∨
Bank
50 TREASURER OF VIRGINIA × ∨   Accrual Indicator
Deposit   Currency
                  Choose Currency Code   ∨

SAVE   ADD ACCOUNTING

5. Enter the **Line Description**.
   - This description will appear in FGITRND and on budget reports that list transactions.

6. Select **Add Accounting** to enter additional lines.

7. Repeat **Steps 1-5** in *Entering Budget Adjustment Lines* for each budget line being adjusted.

Sequence Number : 1

Status :
Program

143 AUDIO/VISUAL SERVICES

Percent

Amount *   Debit/Credit *
1,653.00   - Minus   × ∨

                  Document Reference
NSF Override

Description *   Budget Period
TO COVER PHOTO EQUIP Choose Budget Period   ∨
Bank
50 TREASURER OF VIRGINIA × ∨   Accrual Indicator
Deposit   Currency
                  Choose Currency Code   ∨

SAVE   ADD ACCOUNTING

Saving, Reviewing, and Submitting the Journal

1. Once all budget adjustment lines have been entered, select Save at the bottom of the screen.
   - This action returns you to the journal summary page, which displays all lines entered for the journal.

Sequence Number : 2

Status : ✅ Postable

Program

| 143 AUDIO/VISUAL SERVICES |

Percent

Amount *

| 1,653.00 |

Debit/Credit *

| + Plus | × ⌄ |

☐ NSF Override

Document Reference

Description *

| TO COVER EQUIPMENT |

Budget Period

| 01 | × ⌄ |

Bank

| 50 TREASURER OF VIRGINIA | × ⌄ |

☐ Accrual Indicator

Deposit

Currency

| Choose Currency Code | ⌄ |

SAVE   **ADD ACCOUNTING**

2. Review the journal entries for accuracy.
   - Ensure the journal is balanced by making sure that all -Minus adjustments equal all +Plus adjustments within the journal.
   - To make changes, select the line you wish to revise. The entry will open and allow edits.

My Finance • My Journals • J2600435

J2600435

Transaction date :12/31/2025   Total :3,306.00   Status :   Draft

Accounting Distribution (2)

	Sequence	Status	Type	Chart	Percent	Amount	Debit/Credit	Index	Fund	Organization	Account	Program	NSF Override
☐	1	✅	XB4	U	--	1,653.00	- Minus	1TT00	011001	1TT00	7999	143	☐
☐	2	✅	XB4	U	--	1,653.00	+ Plus	1TT00	011001	1TT00	9899	143	☐

Accounting total : 3,306.00   ⊕ Add accounting

Back   Save as draft   Submit Journal

3. After all entries have been reviewed and validated, select Submit Journal to initiate the workflow approval process.

My Finance • My Journals • J2600435

J2600435

Transaction date :12/31/2025   Total :3,306.00   Status :   Draft

Accounting Distribution (2)

	Sequence	Status	Type	Chart	Percent	Amount	Debit/Credit	Index	Fund	Organization	Account	Program	NSF Override
☐	1	✅	XB4	U	--	1,653.00	- Minus	1TT00	011001	1TT00	7999	143	☐
☐	2	✅	XB4	U	--	1,653.00	+ Plus	1TT00	011001	1TT00	9899	143	☐

Accounting total : 3,306.00   ⊕ Add accounting

Back   Save as draft   Submit Journal

4. The journal will move to the Pending Journals section of My Journals, where it will remain until approved and posted.

Attaching Supporting Documentation to a Journal
PLEASE NOTE: *Access to Banner Document Management (BDM) is Required for this step! To gain access to BDM, please complete the online Midas Account Request Process. For step-by-step instructions, see the How to Request Access Video.*
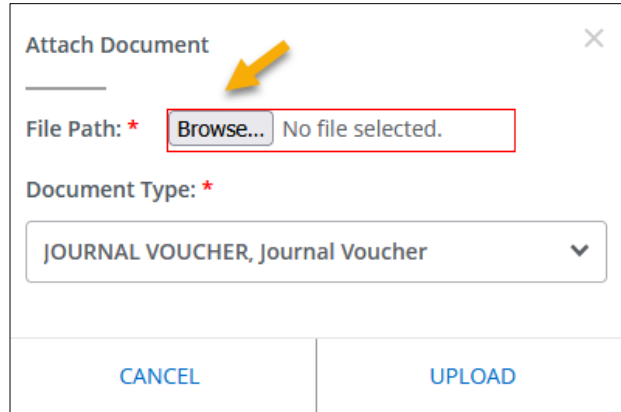
1. From the journal **Summary Page**, select the **Paper Clip** icon to open the attachments window.

2. Select **Attach File**.

3. Click **Browse** next to the **File Path** field.

4. Navigate through **File Explorer** to locate the supporting documentation.

Attach Document

File Path: * [Browse...] No file selected.

Document Type: *

JOURNAL VOUCHER, Journal Voucher

CANCEL   UPLOAD

5. Select the document and click **Open**.

File Upload

This PC > user (\\home1.ts.odu.edu) (H:) > lmomprem > Temp Files

Organize ▼   New folder

TEMP

This PC
OS (C:)
user (\\home1.ts.odu.edu) (H:)
data (\\monarch1.ts.odu.edu) (I:)
data (\\admin1.ts.odu.edu) (J:)
data (\\acad1.ts.odu.edu) (K:)
Network

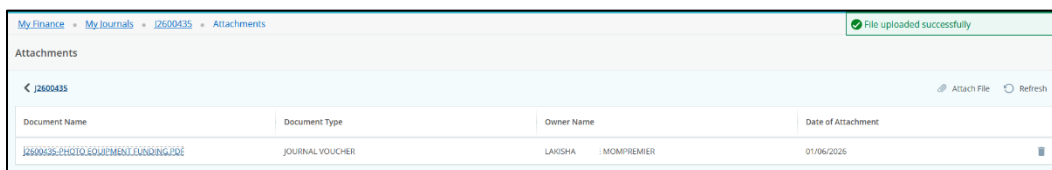| Name	Date modified	Type	Size
J2600435-Photo Equipment Funding	1/6/2026 5:11 PM	Adobe Acrobat D...	282 KB

File name: J2600435-Photo Equipment Funding   All Files

Open   Cancel

Attach Document

File Path: * [Browse...] J2600435-P...nding.pdf

Document Type: *

JOURNAL VOUCHER, Journal Voucher

CANCEL   UPLOAD
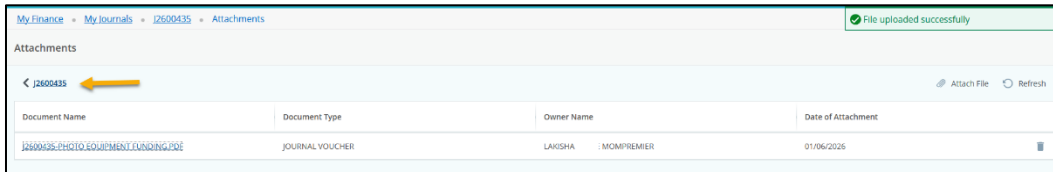
6. Select **Upload** to attach the document to the journal.

- The uploaded document will appear in the attachments list.

My Finance • My Journals • J2600435 • Attachments   ✓ File uploaded successfully

Attachments

< J2600435   Attach File   Refresh

| Document Name	Document Type	Owner Name	Date of Attachment	
J2600435-PHOTO EQUIPMENT FUNDING.PDF	JOURNAL VOUCHER	LAKISHA MOMPREMIER	01/06/2026	

7. Select the **Journal Number** to return to the journal header screen.

8. Once all journal entries and attachments have been reviewed and validated, select **Submit Journal** to initiate the approval workflow process.
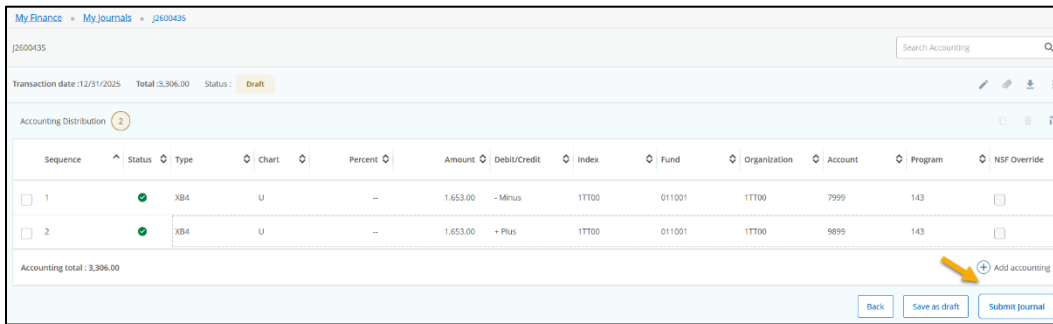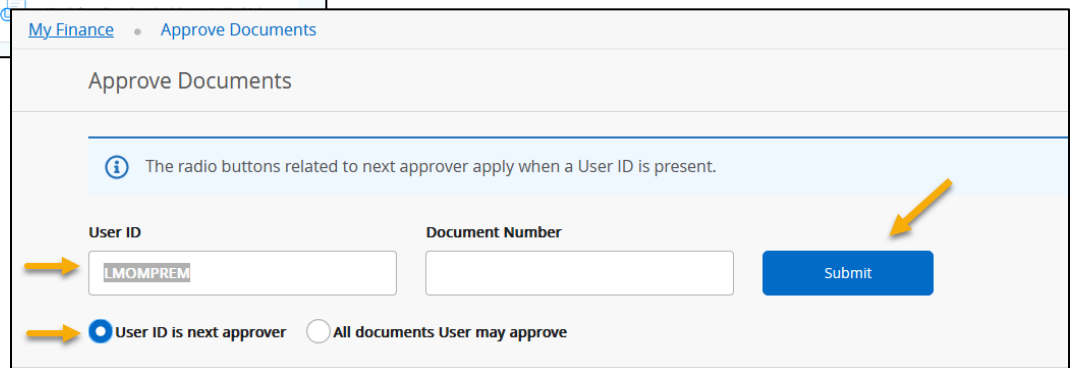

Budget Queue Approval Process
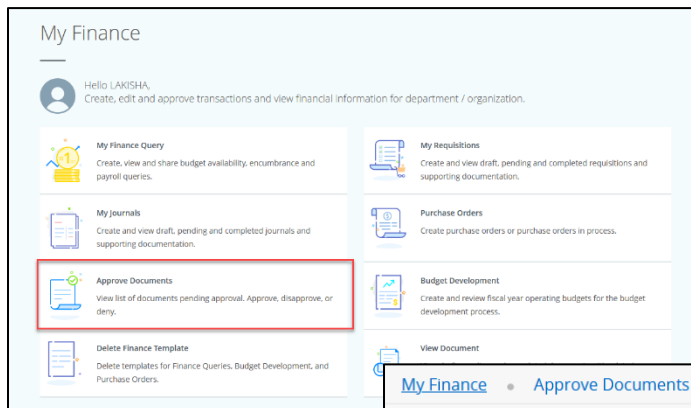
1. From **My Finance Dashboard**, select **Approve Documents**.

- The **User ID** field will automatically populate with your Midas ID.
- Select **User ID is next approver**, then click **Submit**.

A dashboard will display all journals currently awaiting your approval. From this list, you can view:
- Journal numbers
- Journal type
- Submitted-by user
- Total amount of each journal

From this dashboard, approvers can **view journal vouchers**, **view attachments**, **review journal history**, **approve**, or **disapprove** journals.

View Journal Vouchers

1. Click the **journal number** to open the journal voucher.

Document	Document Type	Change Sequence	Submission	Originating User	Amount	Next Approver	NSF	Queue Type	Attachments	History	Disapprove	Approve
J2600388	JV	-	0	EPURWANT	150.00	Yes	-	DOC	📎	⟲	Disapprove	Approve
J2600434	JV	-	0	EPURWANT	10.00	Yes	-	DOC	-	⟲	Disapprove	Approve
J2600373	JV	-	0	EPURWANT	10,000.00	-	-	DOC	-	⟲	Disapprove	Approve
J2600379	JV	-	0	EABRAMS	2,000.00	-	-	DOC	📎	⟲	Disapprove	Approve
J2600438	JV	-	0	WCRUZ	10,000.00	-	-	DOC	📎	⟲	Disapprove	Approve
J2600439	JV	-	0	WCRUZ	10,000.00	-	-	DOC	📎	⟲	Disapprove	Approve
J2600441	JV	-	0	WCRUZ	14,000.00	-	-	DOC	📎	⟲	Disapprove	Approve
J2600443	JV	-	0	WCRUZ	20,000.00	-	-	DOC	-	⟲	Disapprove	Approve
J2600444	JV	-	0	WCRUZ	10,000.00	-	-	DOC	-	⟲	Disapprove	Approve
J2600455	JV	-	0	SDFREEMA	2,000.00	-	-	DOC	📎	⟲	Disapprove	Approve

2. A journal voucher tab will open displaying voucher details, including:
   - Journal Number
   - Document Total (total increases and decreases)
   - Status
   - Username of the journal submitter
   - Transaction Date (posting date) and Activity Date (submission date)
   - Public Comments (supporting justification)
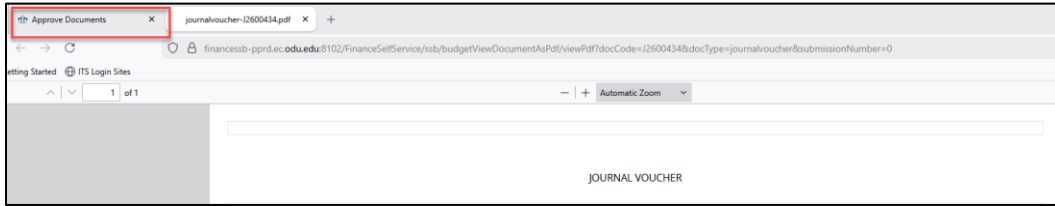   - Budget code adjustments

JOURNAL VOUCHER

Journal Voucher Number	J2600438	Document Total		10,000.00	Status		Pending
Submission	0	User ID	WCRUZ				
Transaction Date	01/09/2026	Activity Date	01/12/2026				
Public Comments	TEST						

Accounting Distributions

| SEQ	Description	FY-Period	Budget Period	Rule Class	Chart- Index- Fund- Orgn- Acct- Prog- Actv- Locn- Proj	Amount	Debit/ Credit	Currency	Bank Code	NSF Override	Status	Document Reference Number	Accrual Indicator	Deposit
1	CRUZ WAS HERE	26- 07	01	XB4	U - 1SA00 - 011001 - 1SA00 - 6999 - 161 - - -	5,000.00	-	USD	50	No	P		No	
2	CRUZ WAS HERE	26- 07	01	XB4	U - 1SA00 - 011001 - 1SA00 - 7999 - 161 - - -	5,000.00	+	USD	50	No	P		No	
					Total Accounting Distributions	10,000.00								

DISCLAIMER - This Journal Voucher PDF is restricted to internal use only.

3. Return to the **Approve Documents** tab when finished.

View Attachments

1. Click the **paperclip icon** next to the journal.

2. SSB will open a new tab displaying the attached document in **Banner Document Management (BDM)**.

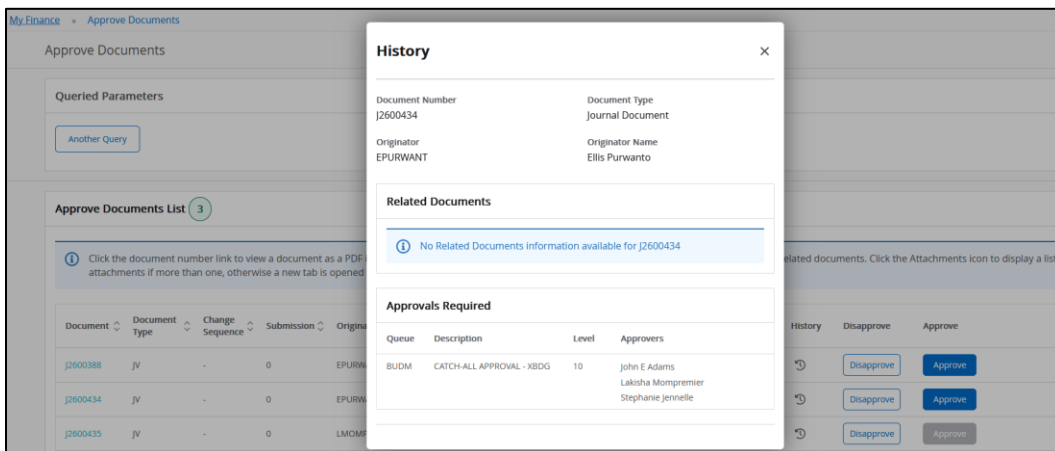3. Return to the **Approve Documents** tab when finished.

View Journal History

1. Click the **clock icon** for the journal.
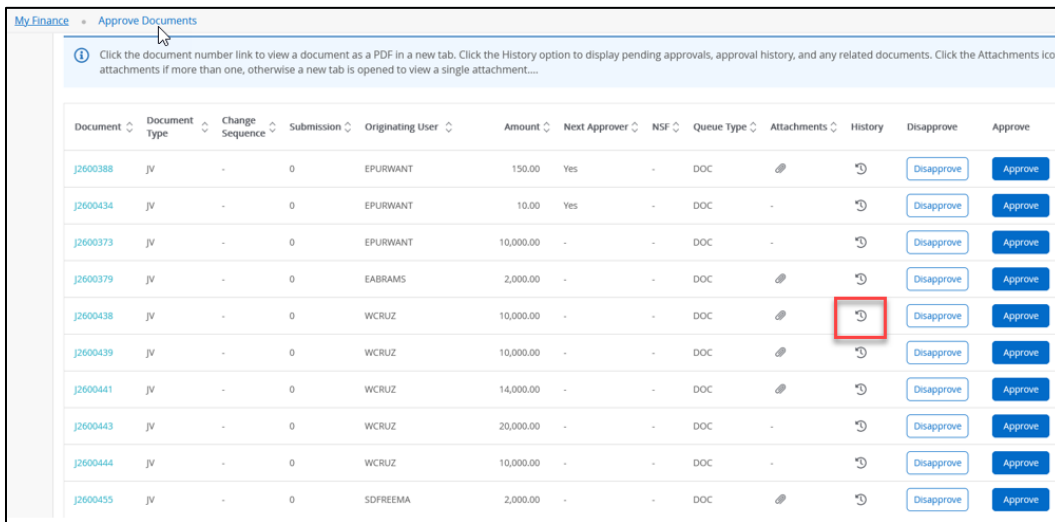
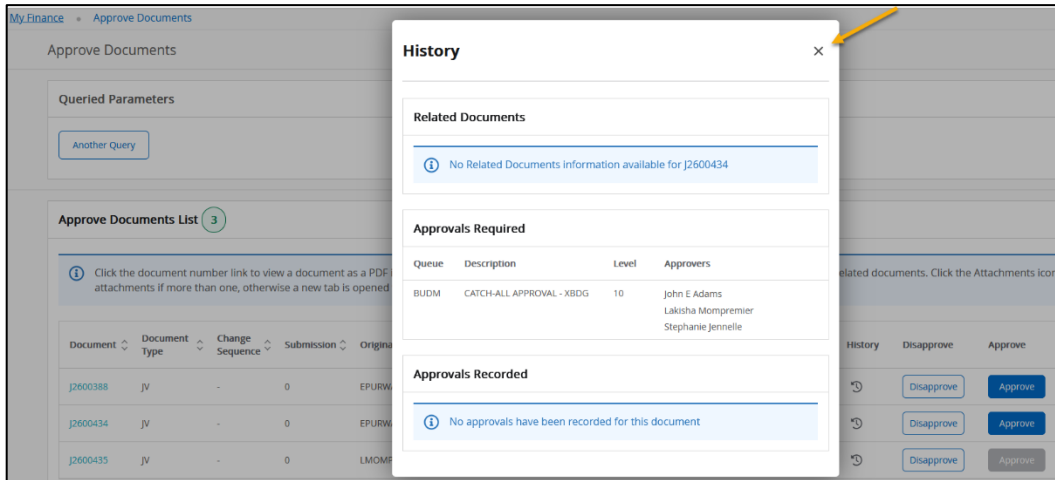2. A pop-up window will appear showing the journal's history, including:
   - Document Number
   - Document Type
   - Originator Name
   - Related Documents
   - Current approval queue
   - Any previous approvals

3. Click the **X** in the top-right corner to close the History window.

To Approve a Journal
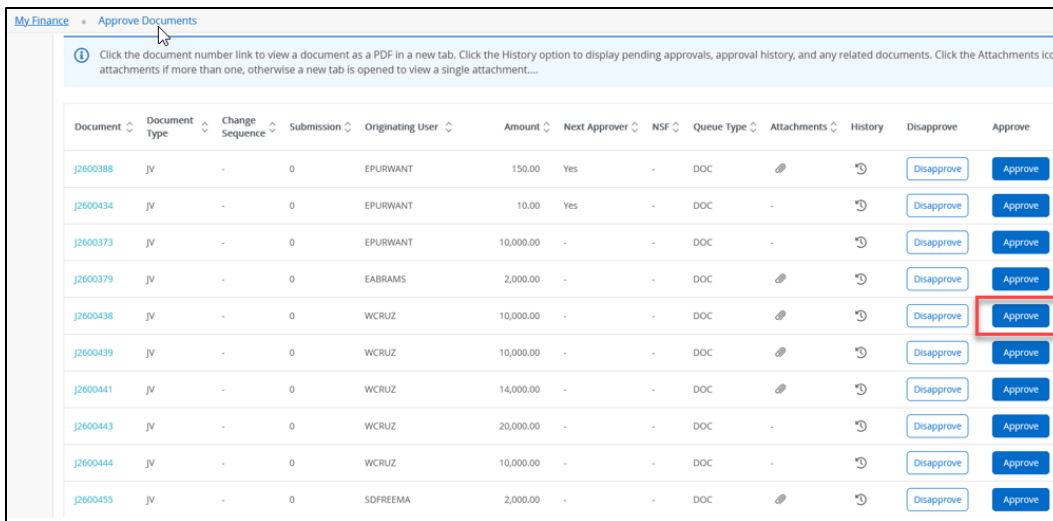
1. Select **Approve**.

2. An **Approve Document** box will appear.
3. Enter comments if needed (optional).
4. Click **Approve** to finalize the approval.
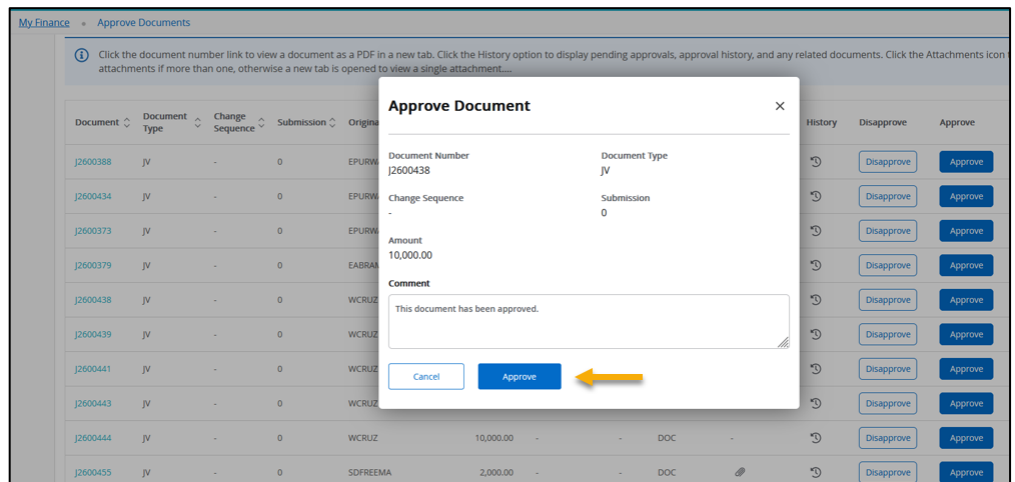
5. A confirmation message will appear in the top-right corner of the screen.

To
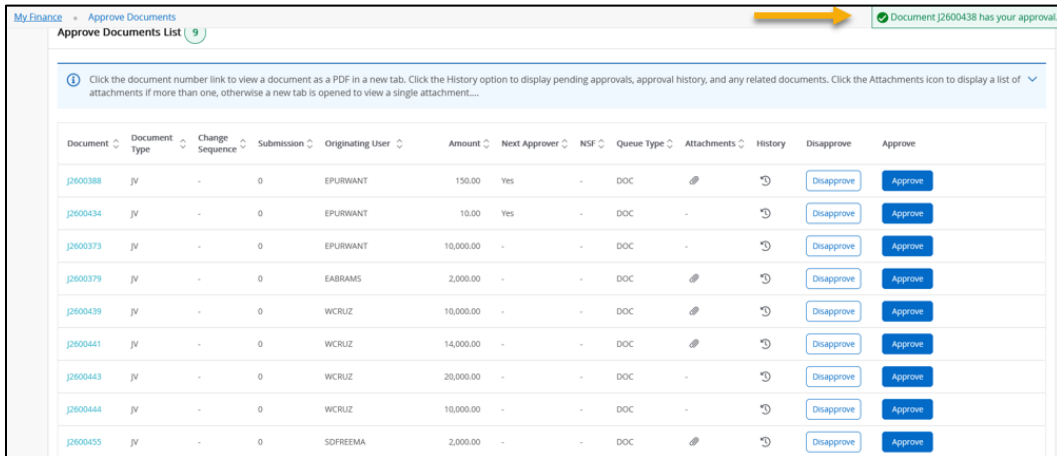
To Disapprove a Journal

1. Select **Disapprove**.
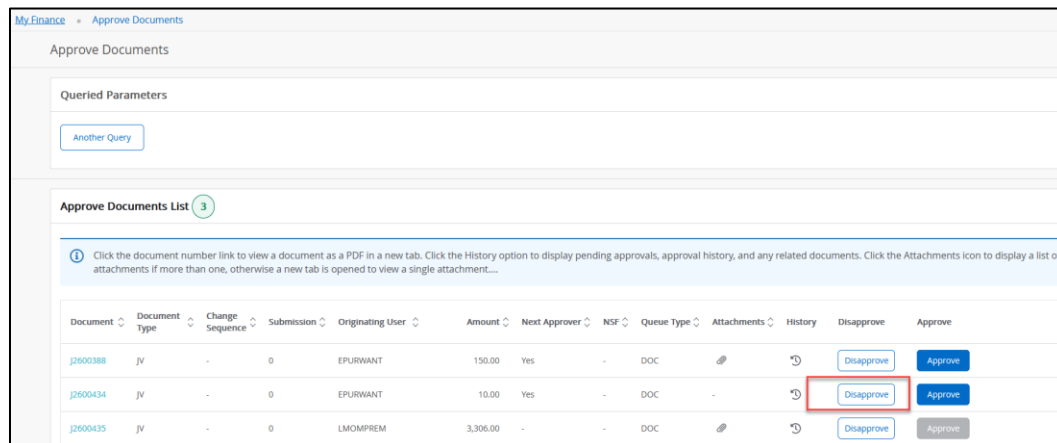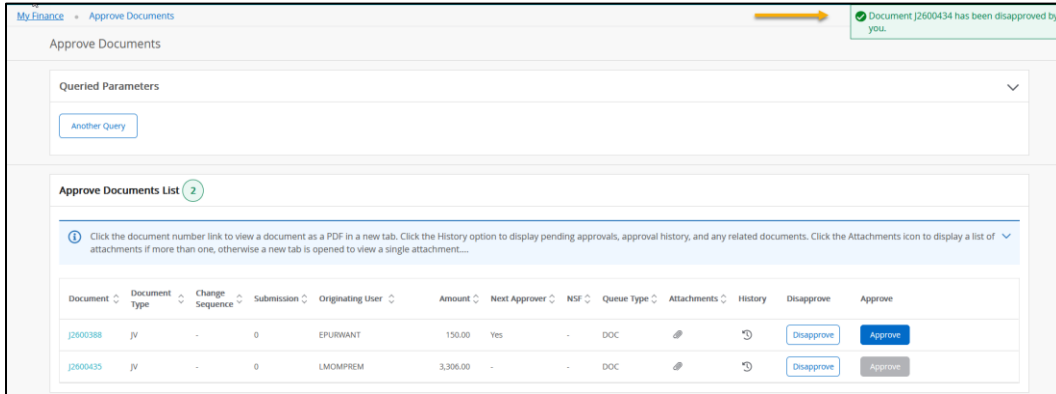
2. The **Disapprove Document** box will open.
3. Enter comments in the Comment field to explain the reason for disapproval (recommended).
4. Select **Disapprove**.

5. A confirmation message will appear in the top-right corner of the screen.

Return to My Finance Dashboard

1. Select **My Finance** to return to the main dashboard.

Links and Contacts:

Website: leoonline.odu.edu

Email: bannerhotline@odu.edu

Additional Training Materials: Banner Finance Training Page