Accessing and Using Budget Development

Self Service Banner's "Budget Development" tool is for budget managers to submit their budget for the upcoming fiscal year.

Accessing Budget Development

Navigate to bardssb.bard.edu and log in using your Bard College credentials. Go to **Finance** then **Department Budget.** Click **Budget Development** to enter the submission platform

Submitting a Budget

Retrieving the Budget Worksheet

1. Click Budget Development Worksheets
2. Under Retrieve Existing Worksheet Query, select the query for the upcoming year. Click Retrieve Query.
3. Adopted Budget and Permanent Budget Adjustments should be checked. Click Continue.
4. Type in your Organization number and click to select it. Scroll down and Submit.

Modifying and Submitting the Budget Worksheet

Definition and descriptions:

- Requery – reverts the worksheet for any calculated but not posted change values
- Calculate – updates the cumulative change and new budget, but does not save the change values
- Post – saves the change values
- Account Type/Code – the account code is a clickable field that opens the justification area for substantial changes
- Base Budget – this is the basis for your budget submission. Any change values calculated will affect this amount. If there is no change value entered for an account, the base budget amount will be used for the budget submission.
- Change Value – the amount increase (+) or decrease (-) requested against the Base Budget value.
- Percent – if checked, treats the Change Value as a percent change against the Base Budget value.
- Cumulative Change – the total amount change requested against the Base Budget value.
- New Budget – The resulting budget request amount to be submitted
- Delete Record – removes the account and any budget dollars associated with it from the submission
- Add Row – please contact the Business Office in order to add an account to your budget worksheet.

This screen is where you will modify your base budget to create your annual budget submission. The key to modifying your budget is remembering that the change value affects the base budget. The change value will not necessarily be the value for the new budget. Change values that result in a 5% or greater increase to your budget will require a justification email.

Examples: Base Budget = 1,000 Change Value = +50 New Budget = 1,050

Base Budget = 500 Change Value = -100 New Budget = 400

Once you are satisfied with your budget worksheet, scroll to the bottom of the page and review the summary totals. Make any other modifications as needed and then click Post.

Please contact the Business Office to lock your submission in order to protect it from unintended modification by you or any other budget managers with access to your organization. We will gladly unlock the submission if you need to modify it as long as the request is made prior to the budget submission deadline.

If you have specific questions regarding your budget, please email dalgiere@bard.edu with all relevant information.

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