Finance in Banner Self Service 9

As of 9/30/2022

To view budget availability for the current fiscal year

- 1. Log into Self Service
- 2. Click on the Finance tab

Personal Information	Student Services & Financial Aid	Employee	WebTailor Administration	Finance
Search	Go			
Requisition				
Purchase Order				
View Document				
Finance Dashboard				
		[Pog	usition Purchase Order Vie	w Document

3. Click on Finance Dashboard

Search	Go		
Requisition			
Purchase Order			

4. Click on My Finance Query

* COLLEGE	
	My Finance
	Hellc Create, edit and approve transactions and view financial information for department / organization.
	My Finance Query Create, view and share budget availability, encumbrance and payroll queries. My Requisitions Create and view draft, pending and completed requisitions and supporting documentation.
	My Journals

5. Click **New Query** from the top right of the screen

My Finance Ouery	
My Finance Query	Search Query Q New Query
Favorites Saved Queries Shared Queries	🗘 Low-High 🍸 🖪

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6. Under Select Query Type, select Budget Status by Account

Create New Query		×
Select Query Type		^
Budget Status by Account		
۹.		
Budget Status by Account		- 1
Budget Status by Organizational Hierarchy		- 1
Encumbrance Query	Index	
Multi Year Query	Choose Index 🗸	
Budget Quick Query		
Fund	Organization *	
10001 General College Fund **	73001 Budget Office ★ ♥	
Account	Program	
Choose Account 🗸	60 Institutional Support * *	
Activity	Location	
Choose Activity 🗸	Choose Location 🗸	•

7. Enter the FOAP (Fund, Organization, Account(optional), Program) details for the unit of which you would like to see the budget status

Create New Query		
Select Query Type		
Budget Status by Account	~	
Values		
Chart*		Index
R Ramapo College of New Jersey	*~	Choose Index 🗸
Fund		Organization*
10001 General College Fund	×v	21104 Institutional Software Maintena × V
Account		Program
Choose Assount	~	60 Institutional Support

8. Scroll down to select the Fiscal Year.

Choose Activity		~	Choose Location		~
Fund Type			Account Type		
Choose Fund Type	2	~	Choose Account T	ype	~
Commitment Type					
All		~	Include Revenue A	Accounts	
Fiscal Year*	2023	**	Fiscal Period*	14	**
Comparison Fiscal Year	None	~	Comparison Fiscal	None	~

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- 9. Leave the fiscal period (set to 14) and other fields as is.
- 10. Scroll down to the **Operating Ledger** section and select the following:
 - a. Adopted Budget (Original Budget)
 - b. Adjusted Budget
 - c. Year to Date (Expenses)
 - d. Commitments (Encumbrances + Reservations)
 - e. Available Balance (Adjusted Budget Year to Date Commitments = Avail. Bal.)

Comparison Fiscal Year	None	~	Comparison Fiscal Period	None	~	•
Operating Ledger						
Adopted Budget 🛈			Year to Date 🛈			
🗌 Budget Adjustment 🤇	D		Encumbrance 🛈			
Adjusted Budget 🛈			Reservation ()			
Temporary Budget 🛈)		Commitments 🛈			
Accounted Budget ①			🗹 Available Balance 🛈)		
		SU	BMIT			Ŧ

11. Click Submit

12. To save this query for future use, click the Save button

My Finance • My Finance Query • Budget Status by Account				
Budget Status by Account				lew Query
Institutional Software Maintenance - 21104	1	>	8	0 :

13. Give the query a name, and set is as favorite (optional), then click Save

Save as				
Budget Avail. for ITS				
Set as favorite				
CANCEL	SAVE			

14. The query will now appear under **Saved Queries** or **Favorites** when returning to the **My Finance Query** page of the Banner Self Service 9 Finance module

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