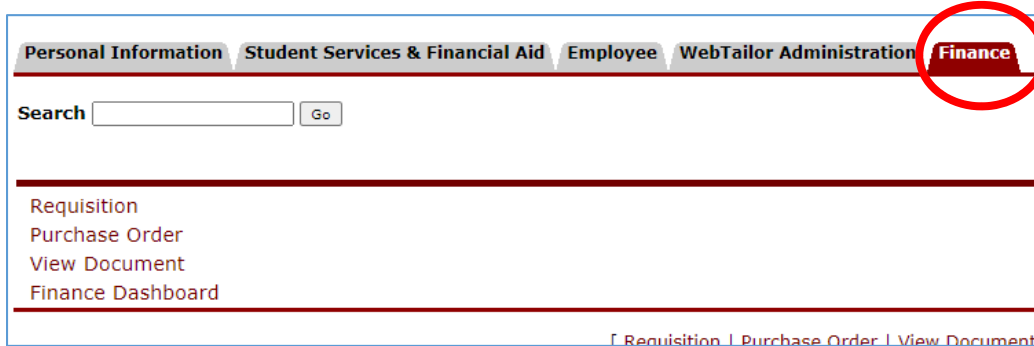


## Finance in Banner Self Service 9

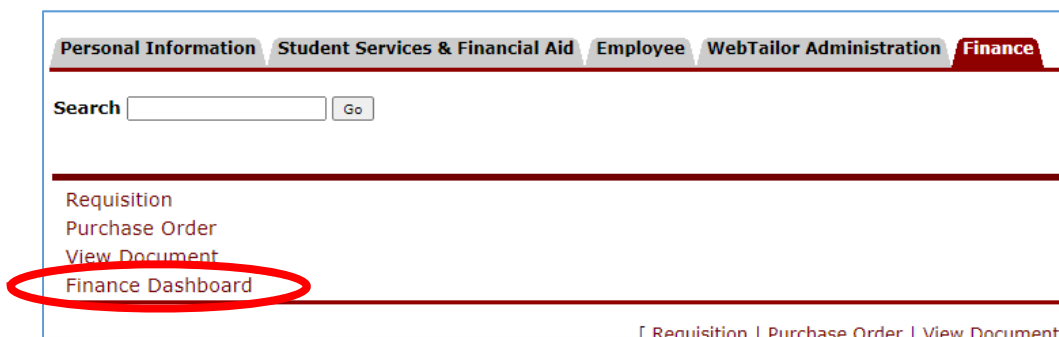
As of 9/30/2022

To view budget availability for the current fiscal year

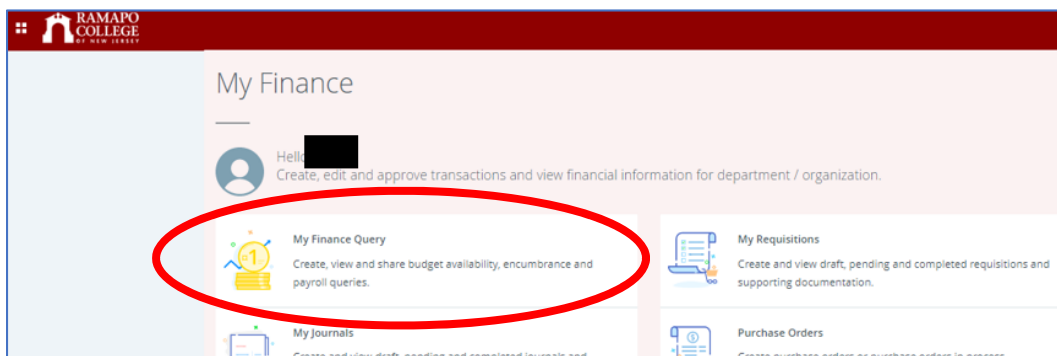
1. Log into **Self Service**
2. Click on the **Finance** tab



3. Click on **Finance Dashboard**



4. Click on **My Finance Query**



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



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

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

8. Scroll down to select the **Fiscal Year**.

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.)

The screenshot shows a configuration window for the 'Operating Ledger'. At the top, there are two dropdown menus for 'Comparison Fiscal Year' and 'Comparison Fiscal Period', both set to 'None'. Below these, the 'Operating Ledger' section contains a grid of checkboxes. The following options are checked: 'Adopted Budget', 'Adjusted Budget', 'Year to Date', 'Commitments', and 'Available Balance'. The following options are unchecked: 'Budget Adjustment', 'Encumbrance', 'Reservation', 'Temporary Budget', and 'Accounted Budget'. Each checkbox has a small information icon (i) to its right. At the bottom center of the window is a blue 'SUBMIT' button.

11. Click Submit

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

The screenshot shows the top of the Banner Self Service 9 Finance module interface. The breadcrumb trail at the top reads 'My Finance > My Finance Query > Budget Status by Account'. Below this, the title 'Budget Status by Account' is displayed. On the right side, there is a 'New Query' button. In the bottom right corner, there is a toolbar with several icons; the 'Save' icon (a floppy disk) is circled in red.

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

The screenshot shows a 'Save as' dialog box. It has a text input field containing the text 'Budget Avail. for ITS'. Below the input field is a checkbox labeled 'Set as favorite', which is currently unchecked. At the bottom of the dialog are two buttons: 'CANCEL' on the left and 'SAVE' on the right.

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