

Banner Self-Service Queries: Adding Calculated Fields

Open Banner: <https://ssb.umt.edu/applicationNavigator/>

On the left-hand side, click on the applications icon shown below. Then click on Banner Self-Service.

The screenshot shows the 'My Finance' dashboard. At the top, it says 'Hello Cindy, Create, edit and approve transactions and view financial information for department / organization.' Below this are several application tiles:

- My Finance Query**: Create, view and share budget availability, encumbrance and payroll queries.
- My Journals**: Create and view draft, pending and completed journals and supporting documentation.
- Approve Documents**: View list of documents pending approval. Approve, disapprove, or deny.
- Delete Finance Template**: Delete templates for Finance Queries, Budget Development, and Purchase Orders.
- Budget Development**: Create and review fiscal year operating budgets for the budget development process.

Click on "My Finance Query".

The screenshot shows the 'My Finance Query' application interface. At the top, there is a search bar labeled 'Search Query' and a 'New Query' button. Below the search bar are tabs for 'Favorites', 'Saved Queries', and 'Shared Queries'. A purple arrow points to the 'New Query' button. The main content area displays three budget-related charts:

- Budget vs Actual Year to...**: A circular progress chart showing 74% completion. Text: \$186,016,722 available; \$65,534,207 spent of \$251,550,930.
- General Fund FY22**: A bar chart showing Revenue: \$0.00 and Expense: \$256,430,826.74. Net: (\$256,430,826.74).
- GF exp**: A circular progress chart showing 1% completion. Text: \$2,960,331 available; \$243,254,586 spent of \$246,214,918.

Users can create a "New Query" or open a query under Favorites, Saved Queries or Shared Queries.

Add Calculated Fields

Click on Shared Queries.

Navigation tabs: Favorites, Saved Queries, **Shared Queries** (selected), Filter icon, Search icon.

Filter bar: Query Name, Query Type, Chart, Created By, Date.

Find Budget vs Actual FY22-FY23. A smaller window will open, modify any parameters and click on Submit.

The following will show up for this query:

Budget Status by Organizational Hierarchy New Query

< Budget vs Actual FY22-FY23 ✎ ➤ 📄 ℹ ⋮

Query Results + ↓

Organization	Organization Title	Health	FY22/PD03 Accounted Budget	FY23/PD03 Accounted Budget	FY22/PD03 Year to Date	FY23/PD03 Year to Date
330000	Provost	✔	\$0.00	\$0.00	\$0.00	\$0.00
331000	Provost	✔	\$4,208,263.00	\$4,543,021.00	\$895,632.03	\$994,893.88
331200	VPAA Dept Operations	✔	\$1,135,091.00	\$1,206,041.00	\$260,704.68	\$324,154.30
331500	Mansfield Center	✔	\$106,368.00	\$107,809.00	\$30,040.62	\$32,637.52
332000	Missoula College	✔	\$4,932,256.00	\$4,805,753.00	\$1,046,383.60	\$1,032,347.53
332500	College of Humanities/Sciences	✔	\$25,812,543.00	\$25,393,040.00	\$5,590,380.86	\$4,450,259.39
333000	College of Business	✔	\$5,997,256.00	\$6,284,521.00	\$1,219,973.52	\$1,182,748.63
Report Total (of all records)			\$84,066,128.00	\$84,939,665.00	\$20,272,520.58	\$18,514,766.05

To add a calculated field, click on **+** in the upper right-hand corner highlighted in the screenshot below.

New Query

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+ ↓

FY22/PD03 Year to Date ⌵ FY23/PD03 Year to Date ⌵

Type in the column name “FY22 Percent of Budget”, select the parameters as shown below. All highlighted fields are required. “FY23 Percent of Budget” is added the same way. Click on “COMPUTE” to add the fields.

Computed Columns
×

New
Remove

Columns Name *

Column 1

Operator

+
-
×
÷
%

Column 2

Display After

COMPUTE

Computed Columns
×

New
Remove

Columns Name *

Column 1

Operator

+
-
×
÷
%

Column 2

Display After

COMPUTE

The query will then show the following:

Budget Status by Organizational Hierarchy New Q									
University of Montana-Missoula - 330000 ✎ ➔ 📄 ⓘ									
Query Results +									
Organization	Organization Title	Health	FY22/PD03 Accounted Budget	FY23/PD03 Accounted Budget	FY22/PD03 Year to Date	FY23/PD03 Year to Date	FY22 Percent of Budget	FY23 Percent of Budget	
331200	VPAA Dept Operations	✔	\$1,135,091.00	\$1,206,041.00	\$260,704.68	\$324,154.30	\$0.23	\$0.27	
331500	Mansfield Center	✔	\$106,368.00	\$107,809.00	\$30,040.62	\$32,637.52	\$0.28	\$0.30	
332000	Missoula College	✔	\$4,932,256.00	\$4,805,753.00	\$1,046,383.60	\$1,032,347.53	\$0.21	\$0.21	
332500	College of Humanities/Sciences	✔	\$25,812,543.00	\$25,393,040.00	\$5,590,380.86	\$4,450,259.39	\$0.22	\$0.18	
333000	College of Business	✔	\$5,997,256.00	\$6,284,521.00	\$1,219,973.52	\$1,182,748.63	\$0.20	\$0.19	
333500	College of Education	✔	\$3,429,082.00	\$3,700,469.00	\$831,135.39	\$860,171.57	\$0.24	\$0.23	
334000	College of the Arts & Media	✔	\$7,623,965.00	\$7,475,256.00	\$1,583,642.18	\$1,566,460.33	\$0.21	\$0.21	
Report Total (of all records)			\$84,066,128.00	\$84,939,665.00	\$20,272,520.58	\$18,514,766.05	\$0.24	\$0.22	

Save this query as a favorite or a saved query by clicking on the icon.

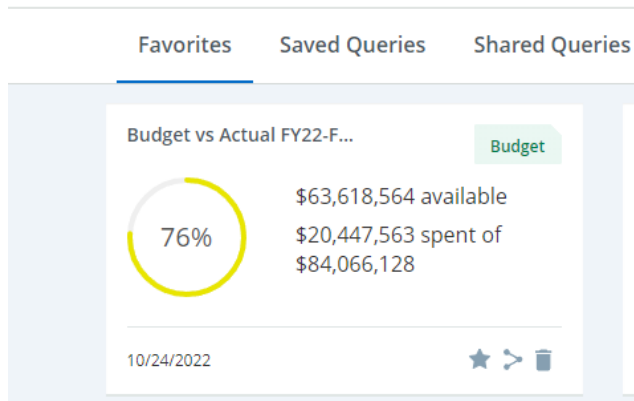
Save as

Set as favorite

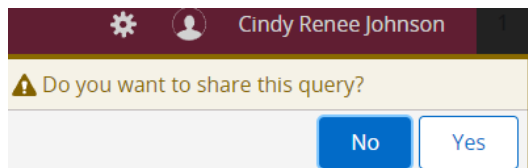
CANCEL
SAVE

Type in the name and check the box “Set as favorite”.

When you return to the “My Finance Query” dashboard you will see your saved query under “Favorites” or “Saved Queries”.to click on and modify as needed.



You can share the query with others by clicking on . A small box will appear below your name confirming the share.



Click Yes.

Access this query by opening it from favorites or saved queries. The calculated fields will save for the user that adds and saves them.