Banner Self-Service Queries

My Finance

Hello Cindy,
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 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”.

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

Click on New Query. A smaller window will open where the user can select a Query type.

Each provides different information depending on your preference.

In this example, “Budget Status by Organizational Hierarchy” is selected with Organization “300000” and Fund “311001”. Click on the arrow next to the Fund or Organization and start typing the desired parameters.
Use the following parameters for this exercise. Organization “300000”, Fund “311001”, Fiscal Year “2022”, Fiscal Period “03”, Comparison Fiscal Year “2023”, Comparison Fiscal Period “03”. Users can select their college or department (i.e. 333000, College of Business) instead of “300000” to view the general operating budget and expenses for their departments.

<table>
<thead>
<tr>
<th>Fiscal Year*</th>
<th>2022</th>
<th>Fiscal Period*</th>
<th>03</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comparison Fiscal Year</td>
<td>2023</td>
<td>Comparison Fiscal Period</td>
<td>03</td>
</tr>
</tbody>
</table>

Check the box for “Accounted Budget” and “Year to Date”

- [ ] Adopted Budget
- [x] Year to Date
- [ ] Budget Adjustment
- [ ] Encumbrance
- [ ] Adjusted Budget
- [ ] Reservation
- [ ] Temporary Budget
- [ ] Commitments
- [ ] Available Balance
- [x] Accounted Budget

Click on Submit.

The query should look like the following:

![Budget Status by Organizational Hierarchy](image-url)
Saving Queries

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

Save as

Budget vs Actual FY22-FY23

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 to click on and modify as needed.

This query will also show up under Saved Queries:
Editing Queries

Open a saved query. Click on the icon.

A smaller “Edit Query” window will open with your query options.

- **Select Query Type**
  - Budget Status by Organizational Hierarchy

- **Values**
  - **Chart**: The University of Montana
  - **Index**: Choose Index
  - **Fund**: 311001 General Operating
  - **Organization**: Choose Organization
    - 333000
    - College of Business
  - **Account**: Choose Account

You can change selections and then click submit.

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