

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".

My Finance Query

Search Query

Favorites **Saved Queries** Shared Queries Low-High Filter Share Refresh

Budget vs Actual Year to...

Budget

74%

\$186,016,722 available
\$65,534,207 spent of
\$251,550,930

10/24/2022 Star Share Trash

General Fund FY22

Budget

Revenue : \$0.00
Expense : \$256,430,826.74
Net : (\$256,430,826.74)

10/24/2022 Star Share Trash

GF exp

Budget

1%

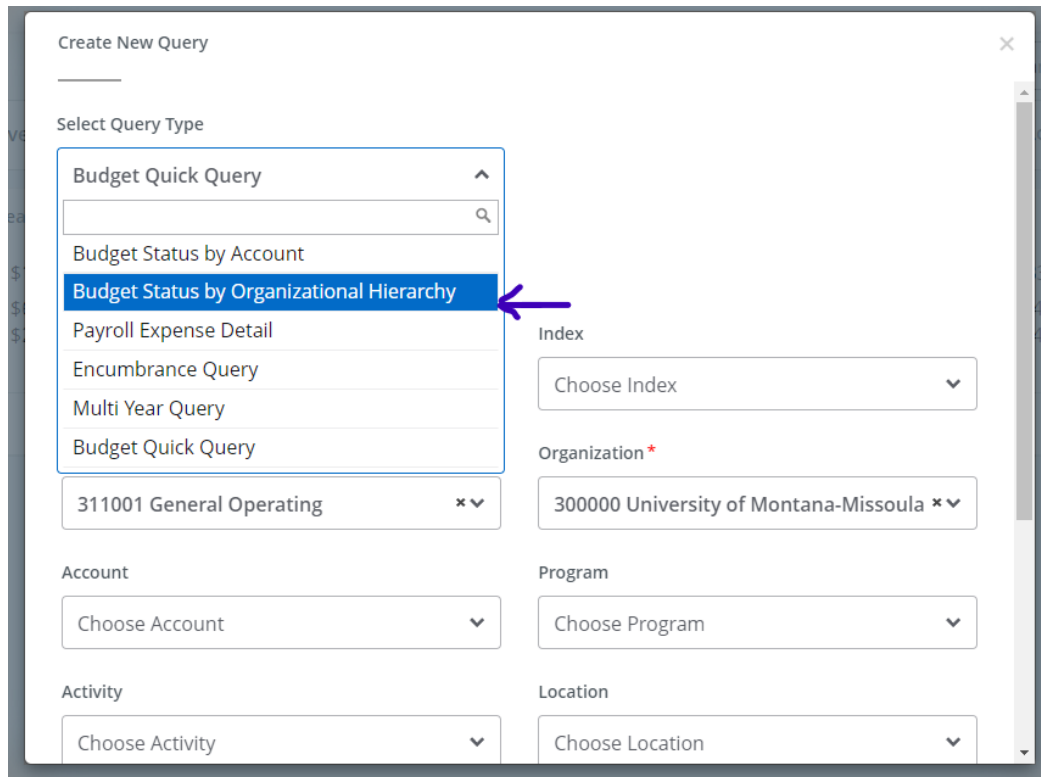
\$2,960,331 available
\$243,254,586 spent of
\$246,214,918

10/24/2022 Star Share Trash

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.



Create New Query

Select Query Type

- Budget Quick Query
- Budget Status by Account
- Budget Status by Organizational Hierarchy**
- Payroll Expense Detail
- Encumbrance Query
- Multi Year Query
- Budget Quick Query

311001 General Operating

Index

Choose Index

Organization *

300000 University of Montana-Missoula

Account

Choose Account

Program

Choose Program

Activity

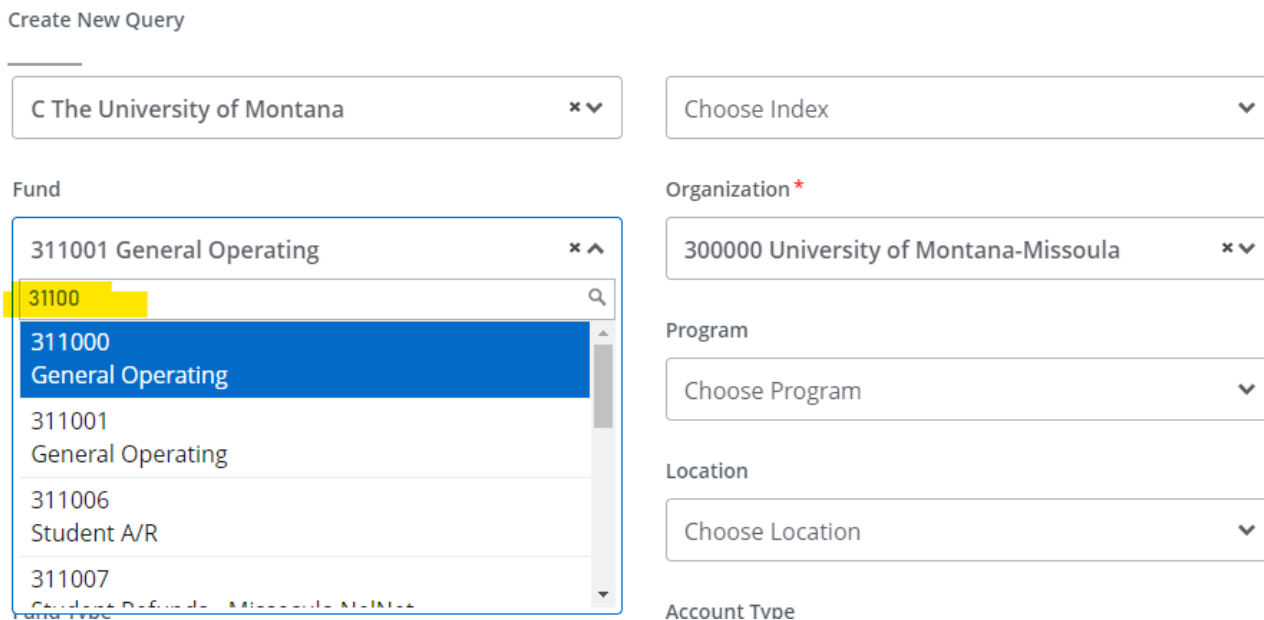
Choose Activity

Location

Choose Location

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.



Create New Query

C The University of Montana

Choose Index

Fund

311001 General Operating

31100

311000 General Operating

311001 General Operating

311006 Student A/R

311007

300000 University of Montana-Missoula

Choose Program

Choose Location

Account Type

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.

Fiscal Year * 2022 x v

Fiscal Period * 03 x v

Comparison Fiscal Year 2023 x v

Comparison Fiscal Period 03 x v

Check the box for "Accounted Budget" and "Year to Date"

Operating Ledger

- Adopted Budget ①
- Year to Date ①
- Budget Adjustment ①
- Encumbrance ①
- Adjusted Budget ①
- Reservation ①
- Temporary Budget ①
- Commitments ①
- Accounted Budget ①
- Available Balance ①

SUBMIT

Click on Submit.

The query should look like the following:

Budget Status by Organizational Hierarchy							New Query
University of Montana-Missoula - 300000							
Organization	Organization Title	Health	FY22/PD03 Accounted Budget	FY23/PD03 Accounted Budget	FY22/PD03 Year to Date	FY23/PD03 Year to Date	
300000	University of Montana-Missoula	✓	\$0.00	\$0.00	\$0.00	\$0.00	
310000	President	✓	\$6,347,764.00	\$7,129,998.00	\$1,446,973.68	\$1,563,526.93	
320000	VP Administration & Finance	✓	\$30,998,207.00	\$32,158,102.00	\$9,813,924.55	\$10,261,636.59	
330000	Provost	✓	\$84,066,128.00	\$84,939,665.00	\$20,272,520.58	\$18,514,766.05	
340000	VP Student Affairs	✓	\$0.00	\$0.00	\$0.00	\$0.00	
350000	VP Marketing & Brand Management	✓	\$0.00	\$0.00	\$0.00	\$0.00	
360000	VP Research & Creative Scholarship	✓	\$7,191,529.00	\$7,418,373.00	\$895,198.82	\$936,380.59	
Report Total (of all records)			\$130,438,570.00	\$134,432,342.00	\$33,559,456.30	\$32,984,538.54	

Saving Queries

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

Save as

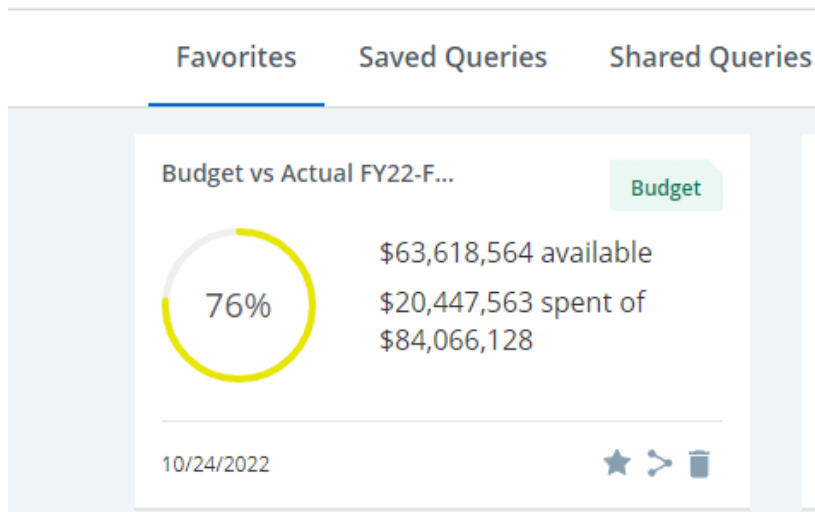
Budget vs Actual FY22-FY23

Set as favorite

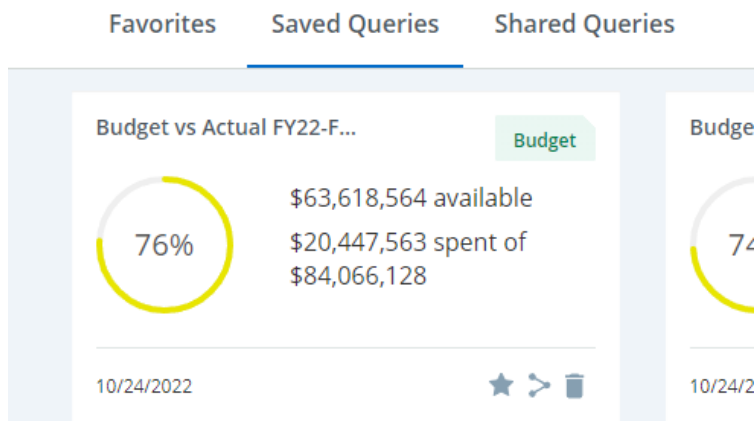
CANCEL SAVE

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.

Edit Query

Select Query Type

Budget Status by Organizational Hierarchy

Values

Chart*

C The University of Montana



Index

Choose Index



Fund

311001 General Operating



Organization*

Choose Organization



333000



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.

A screenshot of a user interface showing a dark red header bar with a gear icon, a user profile icon, and the name "Cindy Renee Johnson". Below this is a light yellow dialog box with a warning icon and the text "Do you want to share this query?". At the bottom of the dialog are two buttons: a blue "No" button and a white "Yes" button with a blue border.