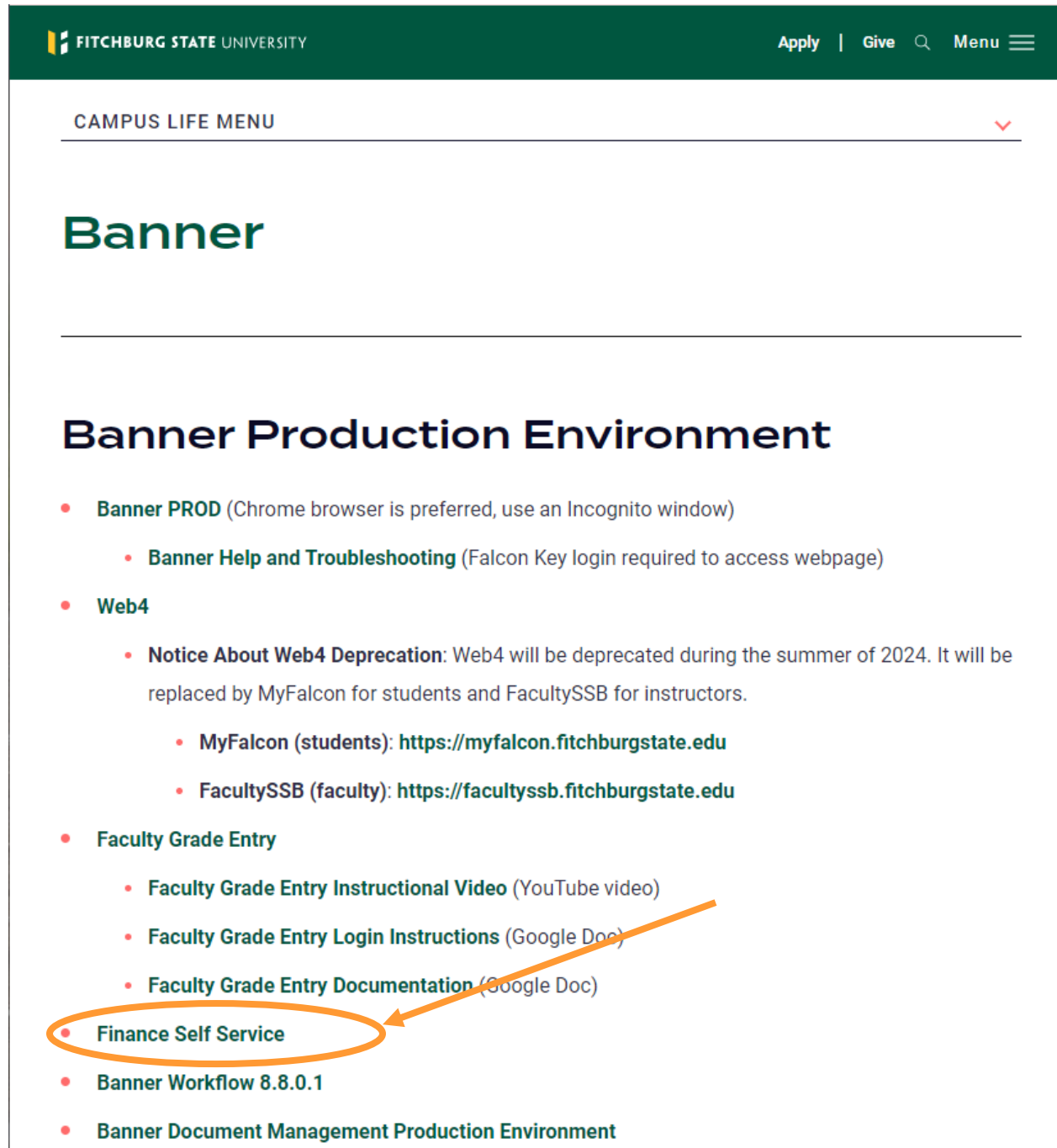


Department Instructions for Budget Queries using Finance Self-Service

- Select Finance Self Service from the Banner Main Menu



The screenshot shows the Banner Production Environment menu on the Fitchburg State University website. The header includes the university logo and navigation links for 'Apply', 'Give', 'Menu', and a search icon. The main menu is titled 'CAMPUS LIFE MENU' and contains a list of items. The 'Finance Self Service' item is circled in orange, and an orange arrow points to it from the right side of the page.

FITCHBURG STATE UNIVERSITY Apply | Give 🔍 Menu ☰

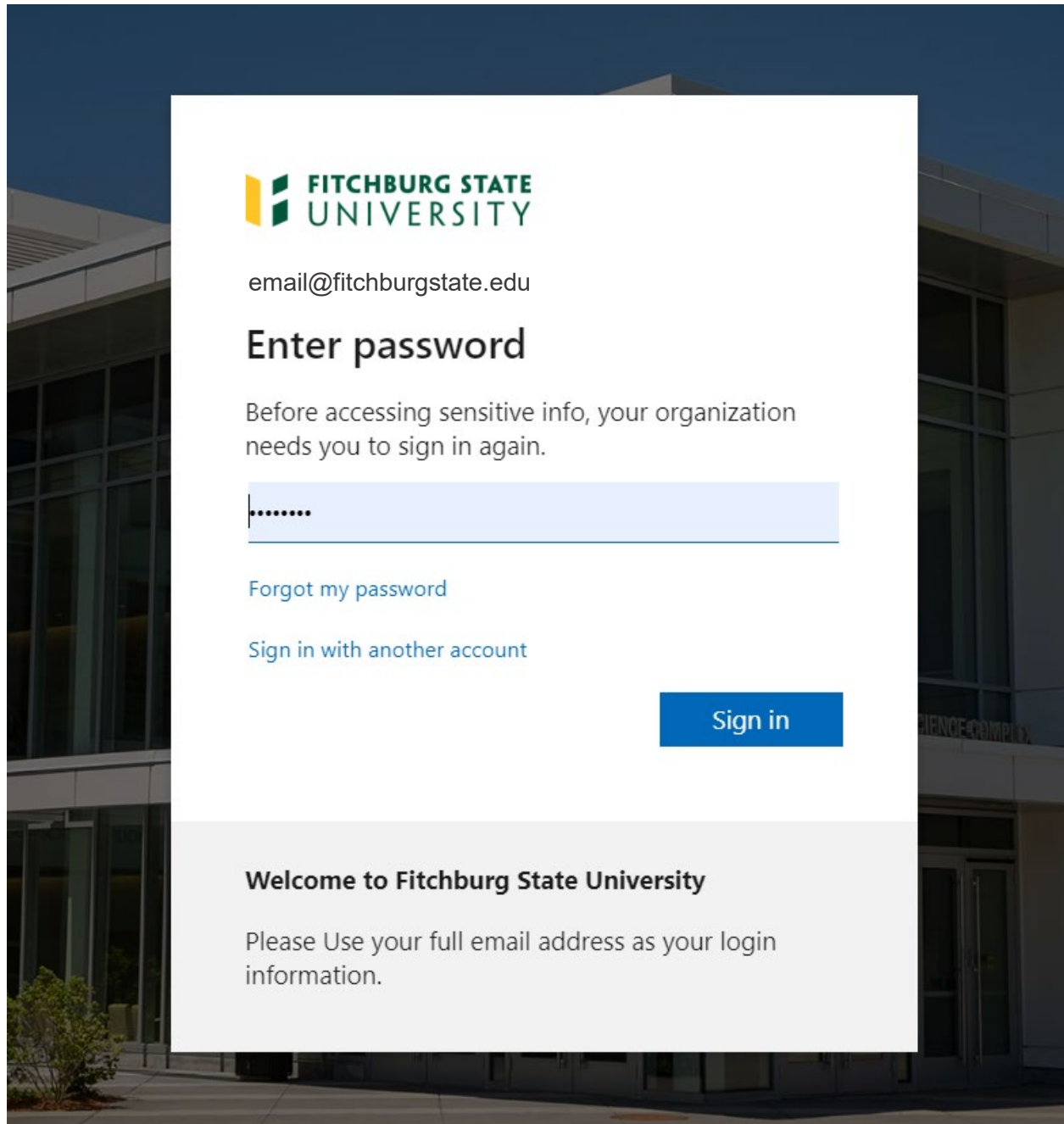
CAMPUS LIFE MENU

Banner




Banner Production Environment

- **Banner PROD** (Chrome browser is preferred, use an Incognito window)
 - **Banner Help and Troubleshooting** (Falcon Key login required to access webpage)
- **Web4**
 - **Notice About Web4 Deprecation:** Web4 will be deprecated during the summer of 2024. It will be replaced by MyFalcon for students and FacultySSB for instructors.
 - **MyFalcon (students):** <https://myfalcon.fitchburgstate.edu>
 - **FacultySSB (faculty):** <https://facultyssb.fitchburgstate.edu>
- **Faculty Grade Entry**
 - **Faculty Grade Entry Instructional Video** (YouTube video)
 - **Faculty Grade Entry Login Instructions** (Google Doc)
 - **Faculty Grade Entry Documentation** (Google Doc)
 - **Finance Self Service**
 - **Banner Workflow 8.8.0.1**
 - **Banner Document Management Production Environment**


- Select Enter Secure Area using Multi-Factor Authentication (MFA)





- Select My Finance Query

 FITCHBURG STATE UNIVERSITY  

My Finance

 Hello Kimberly,
Create, edit and approve transactions and view financial information for department / organization.


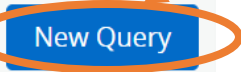
 **My Finance Query**
Create, view and share budget availability, encumbrance and payroll queries.




 **My Journals**
Create and view draft, pending and completed journals and supporting documentation.


- Select New Query

[My Finance](#) • [My Finance Query](#)

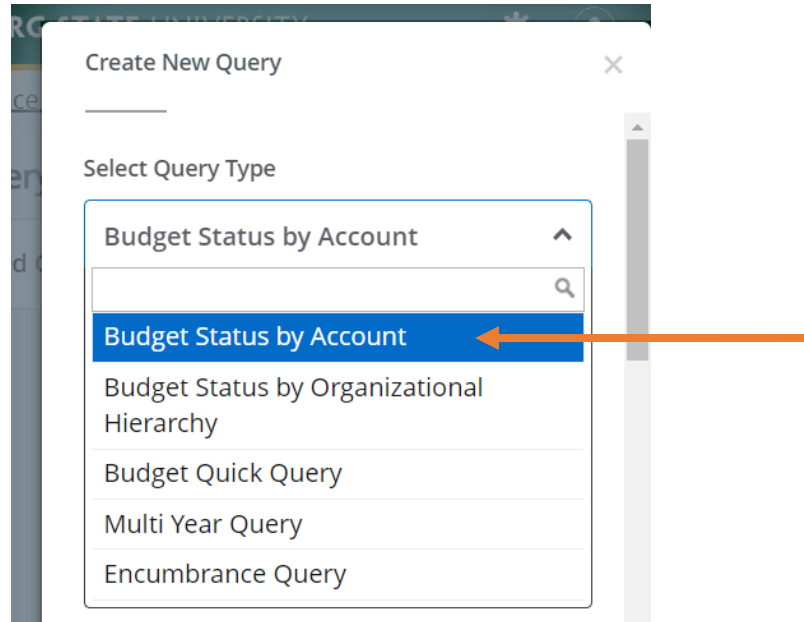
My Finance Query

Search Query  

[Favorites](#) [Saved Queries](#) [Shared Queries](#)  Low-High  



- The create new query screen will appear. Select the query type you want to run from the drop-down box.
 - Budget Status by Account - the basic type of query
 - Budget Status by Organizational Hierarchy - do not use
 - Budget Quick Query - Is relatable to FGIBDST, cannot drill down
 - Multi Year Query - do not use
 - Encumbrance Query – Will tell you all your open PO's. Leave the Grant section blank and it will run.



- Add FOAPAL as you normally would (use program code when more than one is used). You must fill out all the sections with an * at the minimum.

Create New Query

Select Query Type

Budget Status by Account ▼

Values

<p>Chart*</p> <p>1 Fitchburg State University x ▼</p>	<p>Index</p> <p>Choose Index ▼</p>
<p>Fund</p> <p>T65 University Fee Trust Fund x ▼</p>	<p>Organization*</p> <p>4010 Financial Services x ▼</p>
<p>Account</p> <p>Choose Account ▼</p>	<p>Program</p> <p>Choose Program ▼</p>
<p>Activity</p> <p>Choose Activity ▼</p>	<p>Location</p> <p>Choose Location ▼</p>

- Select Fiscal Year and Period. If desired you can select a Comparison Fiscal Year and Period.

Create New Query

Fund Type

Account Type

Commitment Type

Include Revenue Accounts

Fiscal Year *

Fiscal Period *

Comparison Fiscal Year

Comparison Fiscal Period

- A listing of data columns will appear for your selection. For the basic Budget query select Adjusted Budget and Year to Date. The Adjusted Budget is your Original Budget plus or minus all Budget Adjustments completed to date. The Year to Date is the total Expenditures processed against your account.
- Click Submit.

Operating Ledger

Adopted Budget ⓘ

Year to Date ⓘ

Budget Adjustment ⓘ

Encumbrance ⓘ

Adjusted Budget ⓘ

Reservation ⓘ

Temporary Budget ⓘ

Commitments ⓘ

Accounted Budget ⓘ

Available Balance ⓘ

[SUBMIT](#)

- Your query information will appear. Below is a sample of the data retrieved. All data fields that appear on the screen in blue font may be drilled down into to see the transactional activity behind the numbers. To execute a new query simply hit the new query button and select new parameters.

My Finance • My Finance Query • Budget Status by Account

Budget Status by Account New Query

Financial Services - 4010

Query Results

Account	Account Title	Health	FY24/PD14 Adjusted Budget	FY24/PD14 Year to Date
B00	Pool Budget Account	✓	\$1,322.13	\$0.00
B01	Out of State Travel&Conf.Registri	⚠	\$0.00	\$1,930.99
B02	In State Travel & Conf.Registration	⚠	\$0.00	\$754.63
C00	Pool Budget Account	✓	\$3,083.86	\$0.00
CC5	Student workers no fringe	⚠	\$0.00	\$3,270.00
E00	Pool Budget Account	✓	\$9,490.95	\$0.00
E01	Office & Admin Supplies	⚠	\$0.00	\$824.31
Report Total (of all records)			\$19,532.00	\$20,991.14

Example of drill down (blue fonts):

My Finance • My Finance Query • Budget Status by Account

Budget Status by Account New Query

Financial Services - 4010

Query Results

Transaction Date	Activity Date	Document Code	Vendor/Transacti on Description	Amount	Rule Class Code
06/30/2024	07/09/2024	10285853 ⓘ	Verizon Wireless	\$101.80	INEI
06/11/2024	06/11/2024	10285341 ⓘ	Verizon Wireless	\$111.80	INEI
05/07/2024	05/07/2024	10284512 ⓘ	Verizon Wireless	\$101.80	INEI
04/01/2024	04/01/2024	10283709 ⓘ	Verizon Wireless	\$101.80	INEI
03/04/2024	03/04/2024	10283121 ⓘ	Verizon Wireless	\$101.80	INEI
02/02/2024	02/02/2024	10282555 ⓘ	Verizon Wireless	\$79.50	INEI
01/02/2024	01/02/2024	10281980 ⓘ	Verizon Wireless	\$154.20	INEI
Report Total (of all records)				\$1,526.20	

This is a very dynamic query tool that will provide you with a plethora of data for use in developing your base budgets each FY.