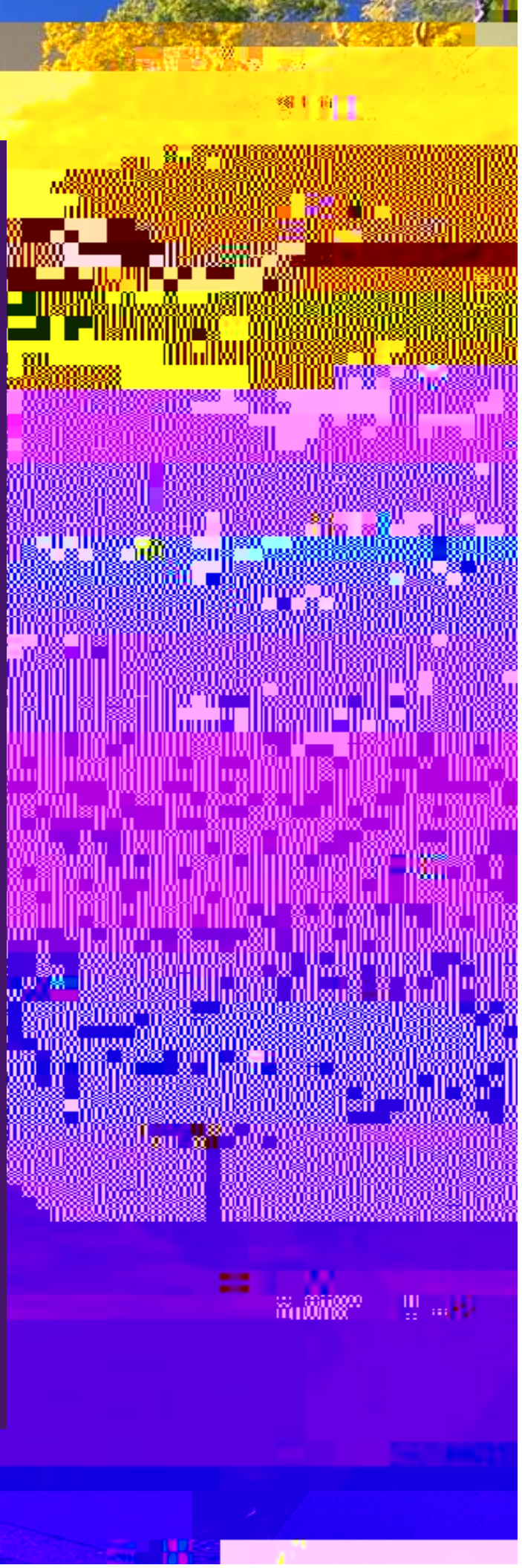


# BUDGET QUERIES USING SELF-SERVICE BANNER





---

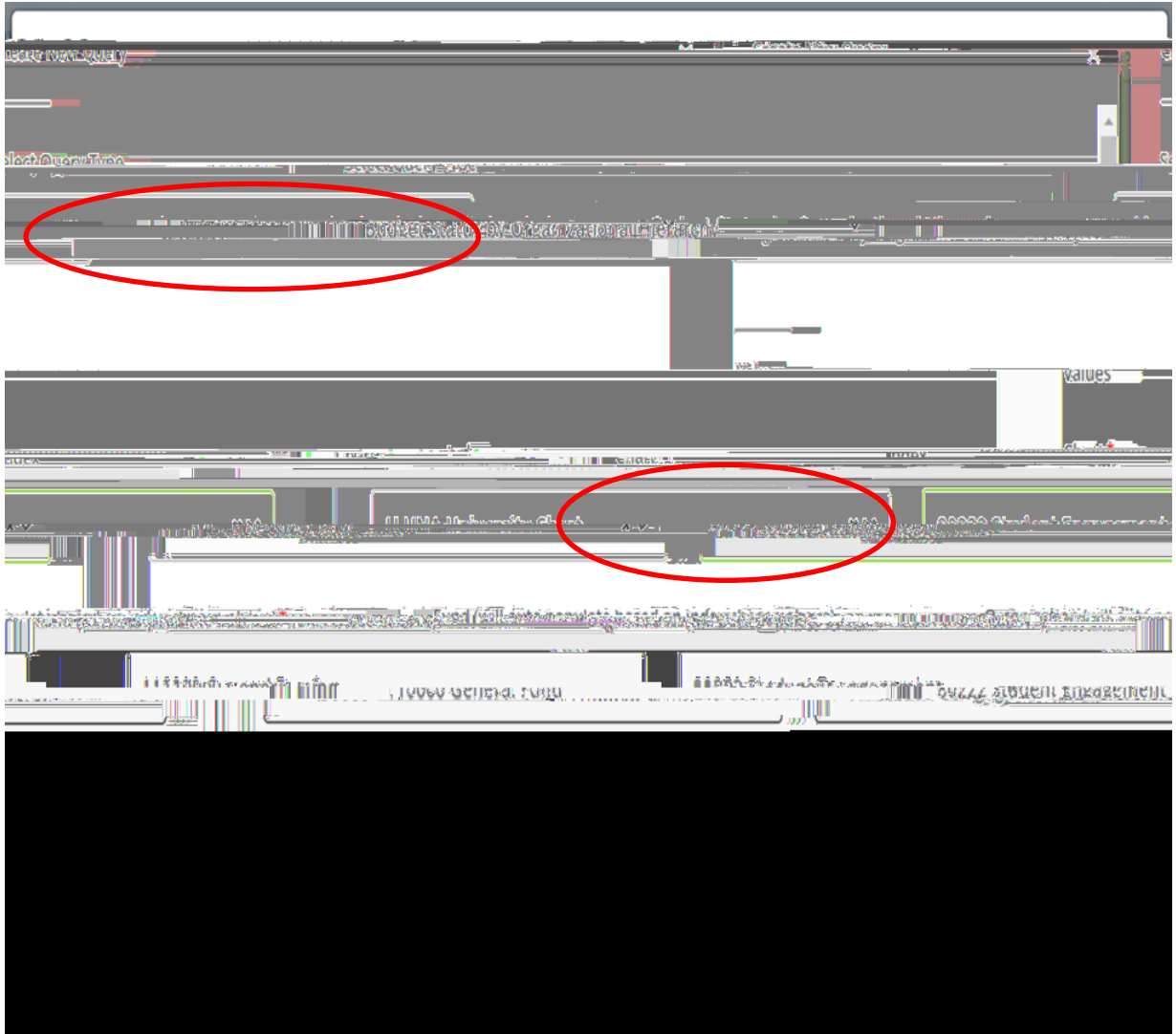
3. This pop-up box should appear:

4. You will then proceed to populate the available fields as follows:

Select Query Type: "Budget Status by Organizational Hierarchy"

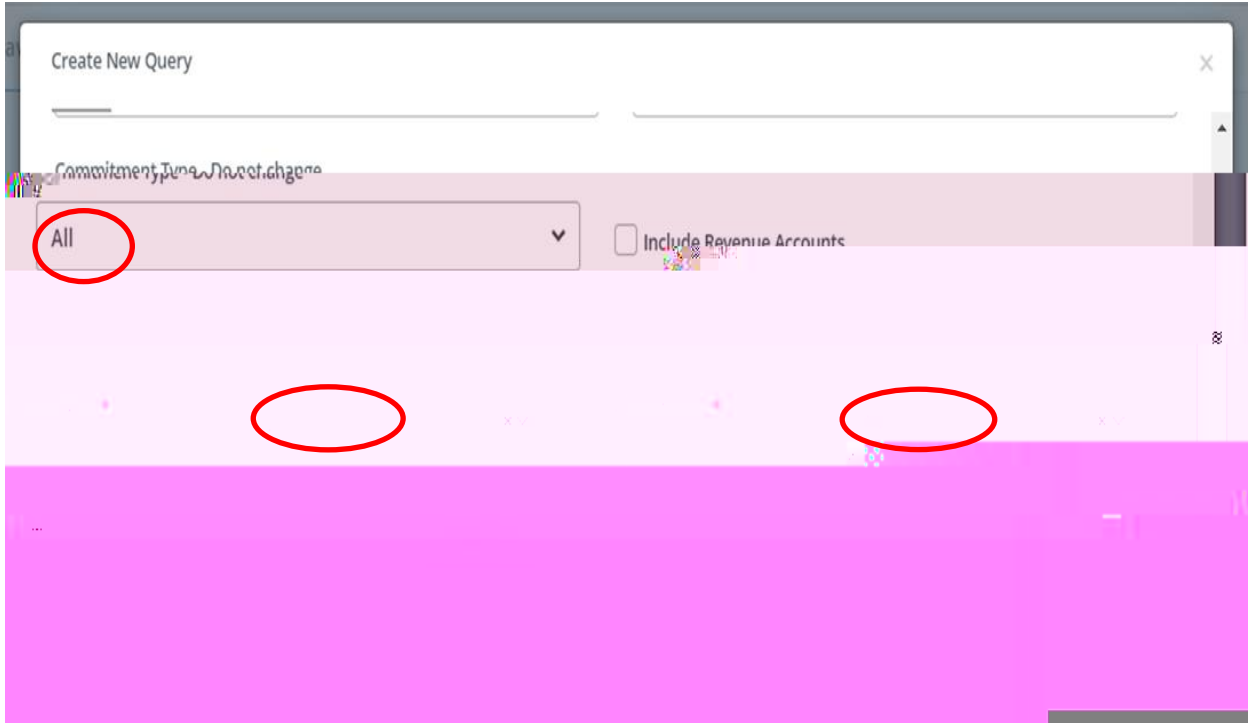
Chart: This will always be "U" for University Chart and should default as such.

Index: Either input your index code or search for it in the drop-down menu. Once your index has been entered and selected, all other items (Fund, Organization, Program) will default to the correct values - no need to adjust anything once they have defaulted.

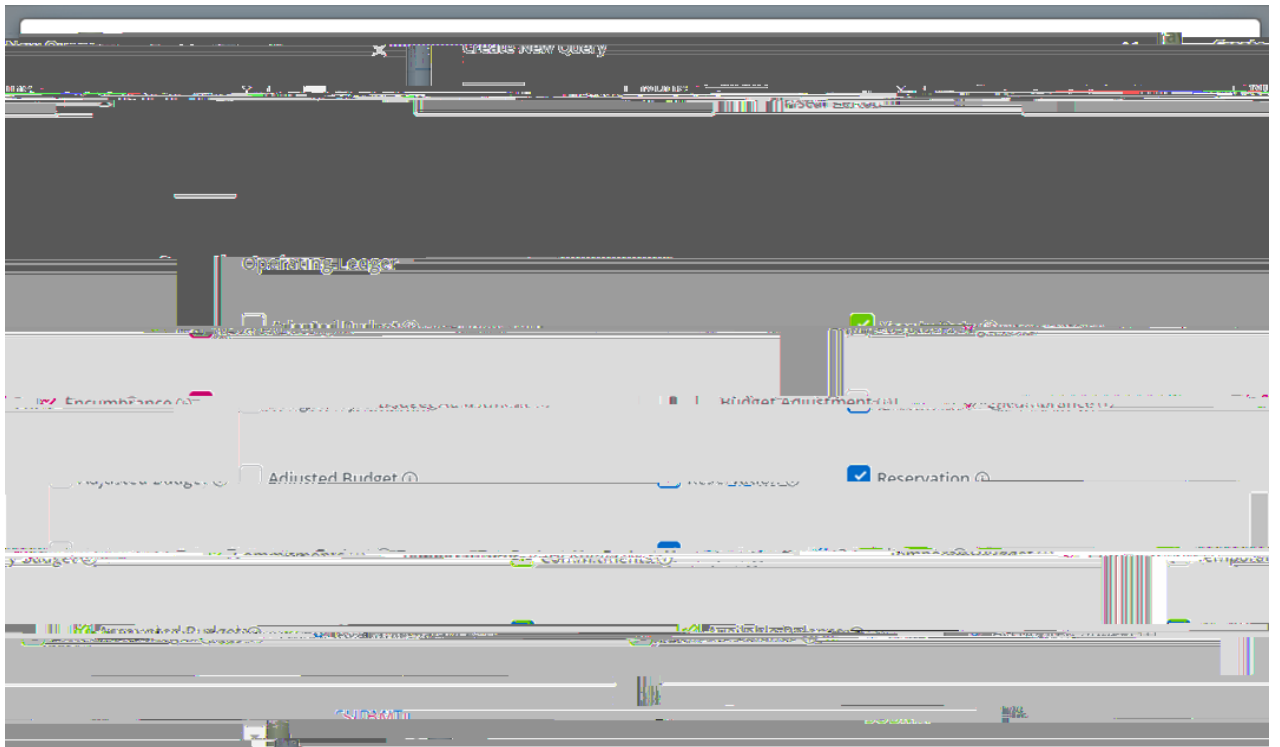


5. Once these steps are complete, scroll to the next portion of the drop-down box and verify the following:  
Commitment Type: "All"  
Include Revenue Accounts: Do **NOT** check this box.  
Fiscal Year: Enter whatever the current fiscal year may be  
Fiscal Period: "14" —NOTE: The fiscal period should **always** be 14 in order to view all activity.

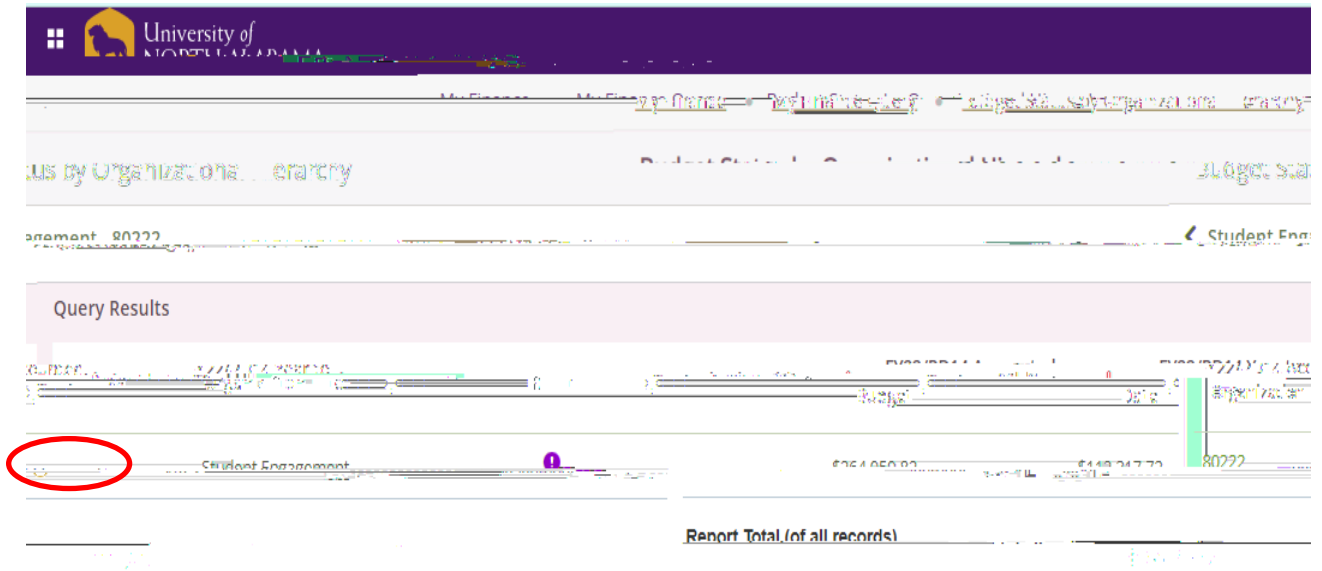
This section of the pop-up box should appear this way:



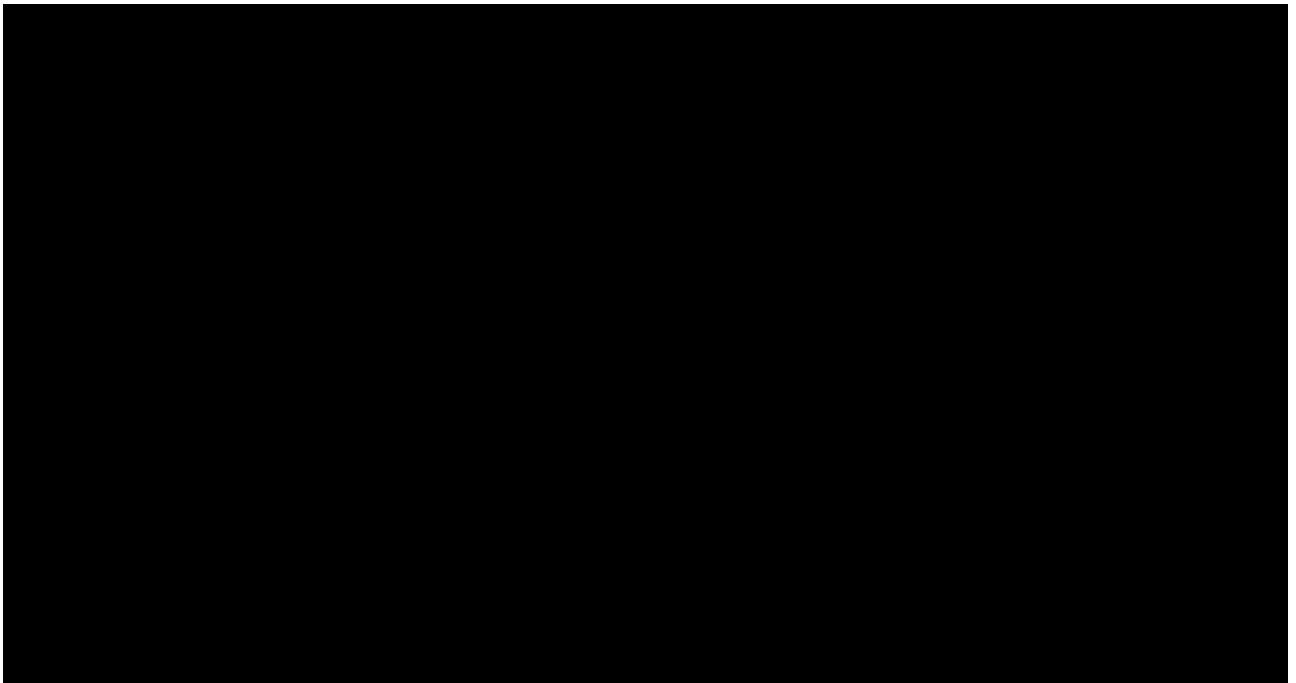
6. Once complete, continue to scroll down to set the final parameters of your dashboard within the Operating Ledger. Your selected fields should be as follows:



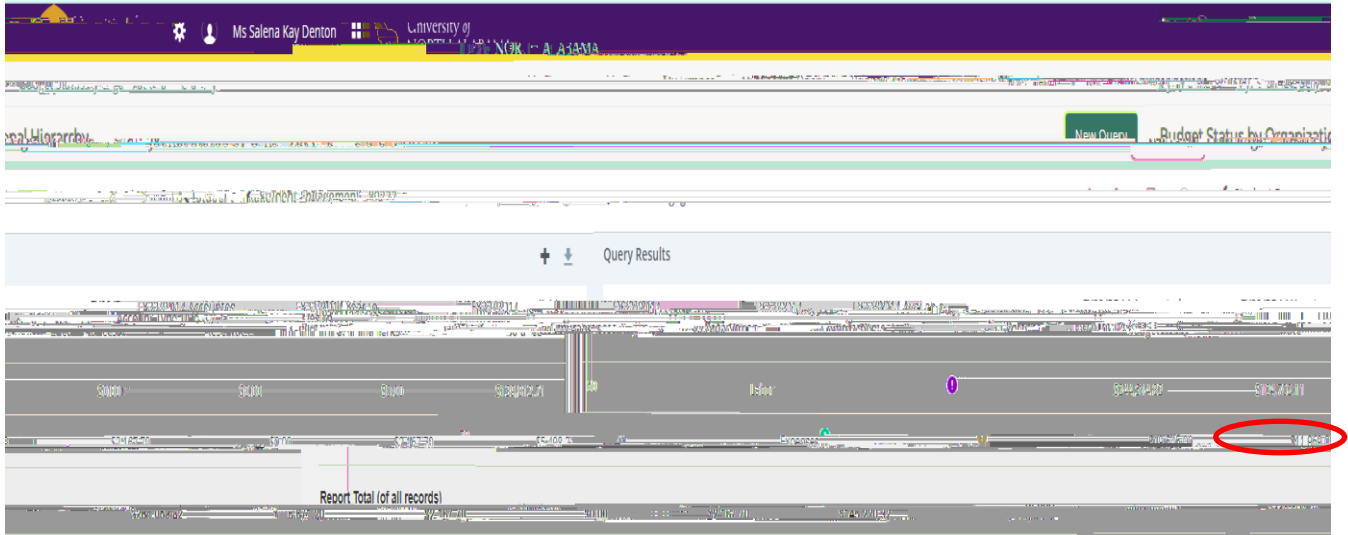
7. Click "Submit".
8. Once submitted, there will be a roll-up/condensed version of your budget. Click on the "Organization Code" to expand in order to see details:



9. You should now see two rows, Labor and Expenses:



10. The amount that is located on the far right in the "Available Balance" column on the "Expenses" row is the current amount remaining in the budget for expense purposes.



The screenshot shows a web application interface for a budget status report. The header includes the user name 'Ms Salena Kay Denton' and the organization 'University of...'. The main content area is titled 'Query Results' and displays a table with columns for 'EXPENSES', 'BUDGET', and 'AVAILABLE BALANCE'. The 'AVAILABLE BALANCE' column is circled in red. Below the table, there is a 'Report Total (of all records)' section.

EXPENSES	BUDGET	AVAILABLE BALANCE
		0

11. If you would like to see a breakdown of how this number is calculated, you can select Account Type "70" which will then allow a view of the accounts with expenditures that have been deducted from your expense pool:

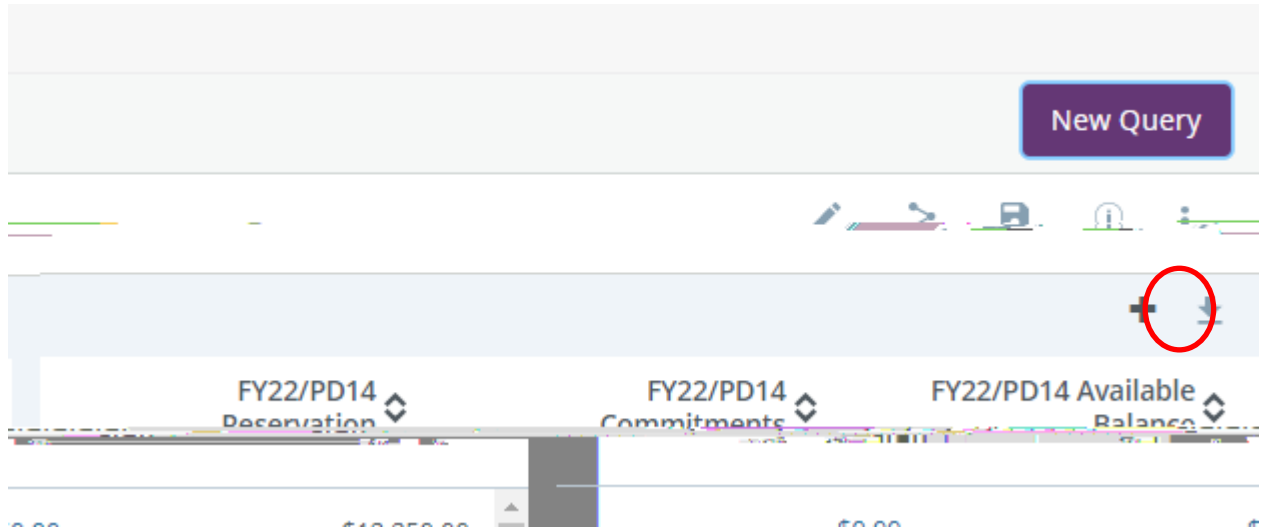






From this point, any of the accounts can be selected to utilize "drill down" capabilities where detailed expenditures can be viewed if required.

12. If you wish to export the information to an Excel spreadsheet, select the "download" option located under the "New Query" button at the top right of your screen:



If you have any questions or need assistance, please email Salena Denton-Jarmon at [skdenton@una.edu](mailto:skdenton@una.edu) or call extension 4699.