

BANNER Self Service Instructions

Steps to viewing your budget -

LoLA → Self Service Banner → Finance → Budget Queries → My Finance Query → New Query → Select Query Type

1. Budget Status by Account – Very detailed report by specific account.
2. Budget Status by Organizational Hierarchy – Total budget by ORG. Must continue to drill down for specific accounts. Also shows net of budget and expenses.
3. Budget Quick Query – Looks similar to the Budget Status by Account. However, you cannot drill down in this report.

Create New Query

Select Query Type

Budget Quick Query

Values

Chart* L LCTCS

Index Choose Index

Fund Choose Fund

Organization* 630007 Comptroller's Office

Account Choose Account

Program Choose Program

Activity Choose Activity

Location Choose Location

* Items with RED asterisk require selection.

Use current Fiscal Year and Fiscal Period 14 for YEAR-TO-DATE information. I recommend selecting Adjusted Budget, Year to Date, Encumbrance, and Available Balance as parameters for the Operating Ledger.

Create New Query ✕

Fiscal Year*	2022 ✕ ▼	Fiscal Period*	14 ✕ ▼
Comparison Fiscal Year	None ▼	Comparison Fiscal Period	None ▼

Operating Ledger

<input type="checkbox"/> Adopted Budget ⓘ	<input checked="" type="checkbox"/> Year to Date ⓘ
<input type="checkbox"/> Budget Adjustment ⓘ	<input checked="" type="checkbox"/> Encumbrance ⓘ
<input checked="" type="checkbox"/> Adjusted Budget ⓘ	<input type="checkbox"/> Reservation ⓘ
<input type="checkbox"/> Temporary Budget ⓘ	<input type="checkbox"/> Commitments ⓘ
<input type="checkbox"/> Accounted Budget ⓘ	<input checked="" type="checkbox"/> Available Balance ⓘ

Submit Query

You can drill down in anything in [blue](#). These queries can be saved, shared and downloaded.

Should you find an expense you don't recognize or has been coded incorrectly, please contact the Accountant responsible for that fund according to the Fund List.