



Banner Finance Self-Service:

Additional Tips

Additional Tips for Budget Queries

Wild Card (%)

The wild card (%) proves to be very useful when you are looking for account codes that all start with the same number. For example, if you are trying to query all account codes that start with 7 you would use a 7% in the account code field. (Figure 1)

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Fiscal year: 2004 **Fiscal period:** 14
Comparison Fiscal year: None **Comparison Fiscal period:** None
Commitment Type: All

| | | | |
|-------------------|--------|--------------|--|
| Chart of Accounts | D | Index | |
| Fund | ZZZZZ1 | Activity | |
| Organization | ZZZZZ2 | Location | |
| Grant | | Fund Type | |
| Account | 7% | Account Type | |
| Program | ZZZZZ3 | | |

Include Revenue Accounts
Save Query as:
 Shared

Figure 1

Another way the wild card (%) proves useful is in the looking up of codes like indexes. To lookup your index codes click on the index button. (Figure 2).

through the Fiscal Year to Date. For a Budget Query to be successful, a user with Fund/Organization Query access must enter a value in either the Organization or Grant fields as well as the Fiscal Period, Year and Chart of Accounts fields.

 You may select a Fiscal Period and Year to compare to the required Fiscal Period and Year. With this selection, all the details that are retrieved will be placed next to the corresponding comparison fiscal period.

| | | | |
|--|------|----------------------------------|------|
| Fiscal year: | 2004 | Fiscal period: | 14 |
| Comparison Fiscal year: | None | Comparison Fiscal period: | None |
| Commitment Type: | All | | |
| Chart of Accounts | D | Index | |
| Fund | | Activity | |
| Organization | | Location | |
| Grant | | Fund Type | |
| Account | | Account Type | |
| Program | | | |
| <input type="checkbox"/> Include Revenue Accounts | | | |
| Save Query as: | | | |
| <input type="checkbox"/> Shared | | | |
| <input type="button" value="Submit Query"/> | | | |

Figure 2

Next enter the first three characters of your index codes in the “Index Criteria” field with a percent sign at the end (i.e., OMP%, BUS%, ZPS%, etc.). Change the “Maximum rows to return” to more than you expect to be retrieved. (Figure 3)

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 Enter criteria then select Execute Query to obtain a Code Lookup results list. Select Exit without Value to return to the parameter page.

| | |
|------------------------|------------------------------------|
| Chart of Accounts | <input type="text" value="D"/> |
| Index Criteria | <input type="text" value="LIB%"/> |
| Title Criteria | <input type="text"/> |
| Maximum rows to return | <input type="text" value="10000"/> |

[\[Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer \]](#)

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Figure 3

Click on “Execute Query” and the query will retrieve all the index codes that start with the first three characters you have entered. This same process can be used to lookup other codes that you need to find (i.e., Account Codes, Organization Codes, etc.).

Querying for Current Available Budget

There are a few additional tips you need to be aware of when querying for your current available budget. If you are not paying for wages (i.e., account codes 650000 – 699999) with an index code (i.e., timecards, hourly employees, etc.), then all you need to do is perform a budget query with 7% in the account code field and your current available budget will be displayed in the “Report Total (of all records)” field. However if you are paying for wages with an index code, you will need to calculate your current budget balance by adding together everything in the “Available Balance” column for account codes 650000-799999. One of the ways to do this is by performing a “Budget Status by Account” query and then clicking on the “Download Selected Ledger Columns” button. When the “File Download” dialog box appears, click on the “Open” button. (Figure 4) This will open the budget query in an excel spreadsheet.

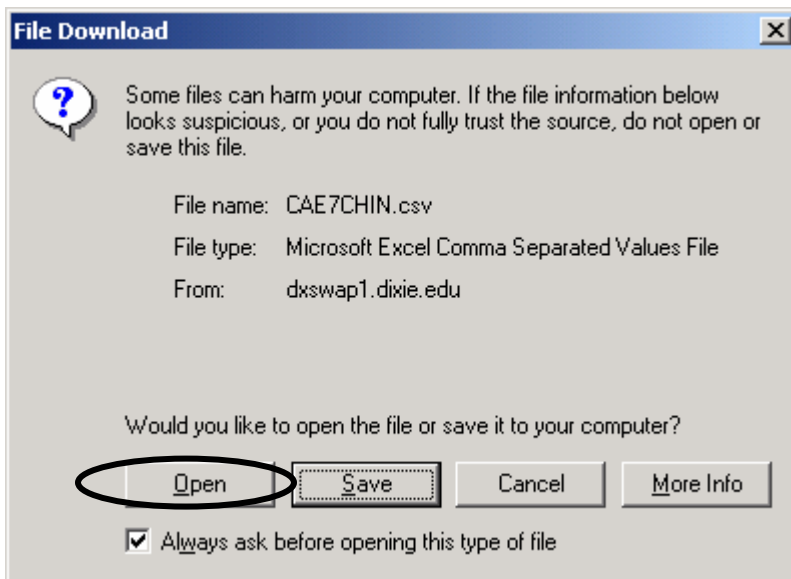


Figure 4

The columns that you will need in your spreadsheet to calculate the current available balance are “Account”, “Account Title”, and “Available Balance”. In your spreadsheet, insert a row to separate the current operating budget account codes (650000-799999) from the other account codes. Next, select the cell at the bottom of the available balance column for the operating budget account codes. Click the “AutoSum” button (“ Σ ”) and then press the “Enter” key. This will give you the current available balance for your operating budget account codes. (Figure 5)

| | A | B | C | D | E | F |
|----|---------|---------------------------------|-----------------|--------------|-------------------|---|
| 1 | Account | Account Title | Adjusted Budget | Year to Date | Available Balance | |
| 14 | 621000 | S-Insurance Medical | 0.00 | 9,627.63 | -9,627.63 | |
| 15 | 622000 | S-Insurance Dental | 0.00 | 962.77 | -962.77 | |
| 16 | | | | | | |
| 17 | 660100 | Wages Full Time Hourly | 0.00 | 1,268.00 | -1,268.00 | |
| 18 | 660300 | Wages Temporary Hourly | 0.00 | 1,887.39 | -1,887.39 | |
| 19 | 660400 | Wages Student Assistants | 0.00 | 4,738.35 | -4,738.35 | |
| 20 | 670100 | W-Workers Compensation | 0.00 | 35.52 | -35.52 | |
| 21 | 670200 | W-FICA | 0.00 | 241.39 | -241.39 | |
| 22 | 670300 | W-Retirement Tiaa/Cref | 0.00 | 35.50 | -35.50 | |
| 23 | 670500 | W-Retirement State NonContribut | 0.00 | 134.39 | -134.39 | |
| 24 | 700000 | Operating Budget Pool | 155,724.00 | 0.00 | 155,724.00 | |
| 25 | 710030 | Luncheons and Reception | 0.00 | 1,265.63 | -1,265.63 | |
| 26 | 710110 | Copying Costs | 0.00 | 189.50 | -189.50 | |
| 27 | 710120 | Printing | 0.00 | 341.44 | -341.44 | |
| 28 | 710150 | Computer Software | 0.00 | 805.00 | -805.00 | |
| 29 | 710460 | Rental of Space | 0.00 | 450.00 | -450.00 | |
| 30 | 710550 | Supplies | 0.00 | 153.06 | -556.56 | |
| 31 | 710600 | Telephone | 0.00 | 3.33 | -3.33 | |
| 32 | 710650 | Uniforms and Wearing Apparel | 0.00 | 51.34 | -51.34 | |
| 33 | 710730 | Postage and Mailing | 0.00 | 177.50 | -177.50 | |
| 34 | 750100 | In-State Travel | 0.00 | 797.80 | -797.80 | |
| 35 | 750200 | Out-of-State Travel | 0.00 | 7,078.75 | -7,078.75 | |
| 36 | 760110 | Scholarships and Waivers | 0.00 | 13,425.00 | -13,425.00 | |
| 37 | 750100 | In-State Travel | 0.00 | 0.00 | 0.00 | |
| 38 | 750200 | Out-of-State Travel | 0.00 | 0.00 | 0.00 | |
| 39 | 760110 | Scholarships and Waivers | 0.00 | 0.00 | 0.00 | |
| 40 | | | | | 122,241.61 | |

Figure 5

Special Notes

Help with Finance Self-Service can be obtained by:

- Accounting Staff in the Business Services Office
<http://www.dixie.edu/busoff/index.html>

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