1. Log into Self Service Banner:

-111	
	NOTICE
	Information Technology has a standard maintenance window every <u>Thursday from 8:30 PM - 12:30 AM</u> .
	During these times, systems may experience intermittent availability.
	Enter your LamarID (case sensitive) and your Personal Identification Number (PIN), select Log In.
	To recover your LEA username and password, Log In and click Personal Information.
	To protect your privacy. Exit and close your browser when you are finished.
	If you have any questions, or require additional information, please contact the Service Desk at 409.880.2222 or email servicedesk@lamar.edu.
	User ID: [20332800 PIN:
	Login Forgot PIN2
	RELEASE: 8.9.1.3
	© 2022 Ellucian Company L.P. and its affiliance. This software contains confidential and proprietary information of Ellucian or its subsidiaries. Use of this software is limited to Ellucian licensees, and is subject to the terms and conditions of one or more written license agreements between Ellucian and such licensees.

2. Click on the 'Finance' Tab at the top and click on 'NEW Finance Self-Service'. Log in with your LEA username and password.

×	
Personal Information Employee Finance Par	ting
Search Go	RETURN TO MENU SITE MAP HELP EXIT
Finance	
NEW Finance Self-Service Click here for the Finance self-service experience. Budget Oueries	
Encumbrance Query	
Approve Document	
Budget Transfer Budget Development Delete Finance Template	
	[NEW Finance Self-Service Budget Queries Encumbrance Query View Document Approve Document Budget Transfer Budget Development Delete Finance Template]





3. Click on the 'My Finance Query'

My Fi	nance		
	Hello Danielle, Create, edit and approve transactions and view financial info	rmation for d	epartment / 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.		Budget Development Create and review fiscal year operating budgets for the budget development process.
• •	Delete Finance Template Delete templates for Finance Queries, Budget Development, and Purchase Orders.		

4. Click on 'New Query' (Top Right Blue Button)

LAMAR UNIVERSITY			*	Danielle Louise Aylor
My Finance My Finance Query				
My Finance Query			Search Query	Q New Query
Favorites	Saved Queries Shared Queries	Low-High	Y D	
	No Favorite Query exists			

Lamar University

Creating a Self-Service Budget Query

- 5. From the 'Select Query Type' dropdown list, click 'Budget Status by Organizational Hierarchy'. Fill out the following.
 - a. Chart: L (always will be L)
 - b. Index: Type in your 6-digit Index (i.e., 661041)- It will automatically populate Fund, Org, and Program
 - c. Confirm 'Fiscal Year' is the current fiscal operating year.
 - d. Confirm 'Fiscal Period' is set to '14'.
 - e. Scroll down and in the 'Operating Ledger' section, check the following:
 - i. Adopted Budget
 - ii. Budget Adjustment
 - iii. Adjusted Budget
 - iv. Year to Date
 - v. Encumbrance
 - vi. Available Balance
 - f. Hit Submit.

Favorites	Create New Query	>	× T D
Mens Terro -3% 06/15/2022	Select Query Type Budget Quick Query Q Budget Status by Account Budget Status by Organizational Hierarchy Payroll Expense Detail Encumbrance Query Multi Year Query Budget Quick Query	Index 661041 Mens Tennis	
	161016 Athletics × v Account v Activity v	61041 Tennis Mens × v Program 4647 Mens Tennis Location	
	Choose Activity 🗸	Choose Location 🗸	•

Favorites	Create New Query	× TB

	Chart*	Index
	L Lamar University **	661041 Mens Tennis × v
	Fund	Organization *
	161016 Athletics	61041 Tennis Mens
	Account	Program
	Choose Account	4647 Mens Tennis
	Activity	Location
	Choose Activity 🗸	Choose Location 🗸
	Fund Type	Account Type
	Choose Fund Type 🗸	Choose Account Type
	Commitment Type	
Favorites	Create New Query	× T B
Favorites	Create New Query Fiscal Year* 2022 **	Fiscal Period*
Favorites	Create New Query Fiscal Year* 2022 **	Fiscal Period*
Favorites	Create New Query Fiscal Year* 2022 *• Comparison Fiscal Year Vear	Fiscal Period * 14 * V B Comparison Fiscal Period None V
Favorites	Create New Query Fiscal Year* 2022 *• Comparison Fiscal Year •	Fiscal Period * 14 * * * Comparison Fiscal Period None *
Favorites	Create New Query Fiscal Year Comparison Fiscal Year	Fiscal Period* Comparison Fiscal Period None
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Favorites	Create New Query Fiscal Year* Comparison Fiscal Year Operating Ledger Adopted Budget ① Budget Adjustment ①	Fiscal Period* 14 Comparison Fiscal Period Year to Date © Encumbrance ©
Favorites	Create New Query Fiscal Year Comparison Fiscal Vear Operating Ledger Adopted Budget © Sudget Adjustment © Adjusted Budget © Adjusted Budget ©	Fiscal Period* 14 Comparison Fiscal Period Vear to Date ① Image: Comparison Priscal Period Image: Comparison Period </th
Favorites	Create New Query Fiscal Year* 2022 * Comparison Fiscal Year Operating Ledger Adopted Budget () Budget Adjustment () Adjusted Budget () Adjusted Budget ()	Fiscal Period* 14 * Comparison Fiscal Period None * Vear to Date () • • @ Encumbrance () • •
Favorites	Create New Query Fiscal Year* 2022 X Comparison Fiscal Year Operating Ledger Adopted Budget () Budget Adjustment () Adjusted Budget () Temporary Budget ()	Fiscal Period* 14 ** Comparison Fiscal Period None Fiscal Period Year to Date () Encumbrance () Reservation () Commitments ()

6. Query Results screen will come up. You can get a more detailed view of your index in the query by clicking the hyper-link (highlighted blue).

					*	
My Finance My Finance Query Budget Status by Organia	rational Hierarchy.					
Budget Status by Organizational Hierarchy						New Query
K Men's Tennis					/	' > B 0 :
Query Results	_					+ ±
organization ≎ Click hyper-link	FY22/PD14 Adopted Budget 🗘	FY22/PD14 Budget Adjustment 🕈	FY22/PD14 Adjusted Budget 🗘	FY22/PD14 Year to Date	FY22/PD14 Encumbrances	FY22/PD14 Available Balance
61041 Tennis Mens	\$234,759.00	\$56,408.85	\$291,167.85	\$283,222.67	\$15,997.01	(\$8,051.83)
Report Total (of all records)	\$234,759.00	\$56,408.85	\$291,167.85	\$283,222.67	\$15,997.01	(\$8,051.83)
My-Einance = My-Einance Query = Budget Status by-Organiz	ational Hierarchy.				*	Danielle Louise Aylor
Budget Status by Organizational Hierarchy						New Query
Men's Tennis						× > 0
Query Results						+ ±
Account Type Click Hyper-link	FY22/PD14 Adopted Budget 🗘	FY22/PD14 Budget Adjustment	FY22/PD14 Adjusted Budget	FY22/PD14 Year to Date	FY22/PD14 Encumbrances	FY22/PD14 Available Balance ᅌ
60 Salaries and Wages	\$79,782.00	\$1,854.00	\$81,636.00	\$63,766.97	\$15,913.50	\$1,955.53
70 Expenditures	\$153,123.00	\$56,408.85	\$209,531.85	\$219,455.70	\$83.51	(\$10,007.36)
80 Transfers	\$1,854.00	(\$1,854.00)	\$0.00	\$0.00	\$0.00	\$0.00
Report Total (of all records)	\$234,759.00	\$56,408.85	\$291,167.85	\$283,222.67	\$15,997.01	(\$8,051.83)

7. Once you find query screen with the information you want to see, you can save that query with name by clicking the disk in the upper right-hand corner.

							*	Danielle Louise Aylo
My-Enance • My-Enance Query • Budget Status by Organizational Hierarchy								
Budget Status by Orga	anizational Hierarc	hy						New Query
K Men's Tennis						Click disk to	save	
Query Results								+ ±
Account Type 🗘	Account Type Title	٥	FY22/PD14 Adopted Budget	FY22/PD14 Budget Adjustment 🗘	FY22/PD14 Adjusted Budget 🗘	FY22/PD14 Year to Date	FY22/PD14 Encumbrances	FY22/PD14 Available Salance
71	Travel		\$39,000.00	(\$12,300.00)	\$26,700.00	\$37,283.37	\$0.00	(\$10,583.37)
72	Other Expenditures		\$18,075.00	\$10,708.85	\$28,783.85	\$29,410.21	\$83.51	(\$709.87)
76	Financial Aid		\$96,048.00	\$58,000.00	\$154,048.00	\$152,762.12	\$0.00	\$1,285.88
Report Total (of all records)			\$153,123.00	\$56,408.85	\$209,531.85	\$219,455.70	\$83.51	(\$10,007.36)

8. Choose a name for the query, check 'Set as Favorite', and hit 'Save'.

						4	Danielle Louise Ayloi
My Finance My Finance	<u>Query</u> Budget Status by Organiz	ational Hierarchy					
Budget Status by Org	ganizational Hierarchy						New Query
🕻 Men's Tennis							/ > 8 0
Query Results							+ ±
Account Type 🗘	Account Type Title	FY22/PD14 Adopted Budget 🗢	FY22/PD14 Budget Adjustment	FY22/PD14 Adjusted Budget	FY22/PD14 Year to Date	FY22/PD14 Encumbrances	FY22/PD14 Available Salance
71	Travel	\$39,000.00	(\$12,300.00)	\$26,700.00	\$37,283.37	\$0.00	(\$10,583.37)
72	Other Expenditures	\$18,075.00		\$28.783.85	\$29,410.21	\$83.51	(\$709.87)
76	Financial Aid	\$96,048.00	Save as	154,048.00	\$152,762.12	\$0.00	\$1,285.88
Report Total (of all records)		\$452 422 00	Men's Tennis Expe	enses	\$240,455,70	¢02 84	(\$10.007.26)
		\$103,123.00	Set as favorite	1209,031.00	6219,455.70	\$63.01	(\$10,007.36)
			CANCEL	SAVE			

9. After a query has been saved it will show up under the 'My Finance Query' in the future when you log in.

			🛠 😨 Danielle Louise Aylor
My Finance My Finance Query			
My Finance Query		Search Query	Q New Query
	Favorites Saved Queries Shared Queries 🗘 Low-High	▼ 8	
	Men's Tennis Expenses Budget -5% \$10,007 exceeded \$219,539 spent of \$209,531		
	06/16/0022		

Notes:

You can edit or delete a query at any time after it is created. 'Fiscal Year' will need to be updated on the saved query to the current fiscal operating year, annually.

For assistance or questions regarding budget queries, please contact the Budget and Financial Planning office at 880-2397 or <u>budget@lamar.edu</u>.