

Lamar University

Creating a Self-Service Budget Query

1. Log into Self Service Banner:

The screenshot shows the Lamar University Self-Service Banner login interface. At the top is a red banner with the Lamar University logo and name. Below this is a 'NOTICE' section in red text stating that the Information Technology department has a standard maintenance window every Thursday from 8:30 PM to 12:30 AM, during which systems may experience intermittent availability. The main content area contains instructions for logging in: users should enter their LamarID (case sensitive) and their Personal Identification Number (PIN), select 'Log In', and recover their LEA username and password if needed. There are also links for 'Login' and 'Forgot PIN?'. A 'RELEASE: 9.9.1.3' notice is present at the bottom of the login section, along with a copyright notice for 2023 Elucian Company L.P. and its affiliates, stating that the software contains confidential and proprietary information of Elucian or its subsidiaries and is subject to license agreements.

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

The screenshot shows the Lamar University Self-Service Banner Finance page. At the top, there is a navigation bar with tabs for 'Personal Information', 'Employee', 'Finance', and 'Parking'. A blue arrow points to the 'Finance' tab. Below the navigation bar is a search bar with a 'Go' button and a 'RETURN TO MENU | SITE MAP | HELP | EXIT' link. The main content area is titled 'Finance' and contains a list of links: 'NEW Finance Self-Service', 'Budget Queries', 'Encumbrance Query', 'View Document', 'Approve Document', 'Budget Transfer', 'Budget Development', and 'Delete Finance Template'. A blue arrow points to the 'NEW Finance Self-Service' link. At the bottom of the page, there is a breadcrumb trail: '[NEW Finance Self-Service | Budget Queries | Encumbrance Query | View Document | Approve Document | Budget Transfer | Budget Development | Delete Finance Template]'.



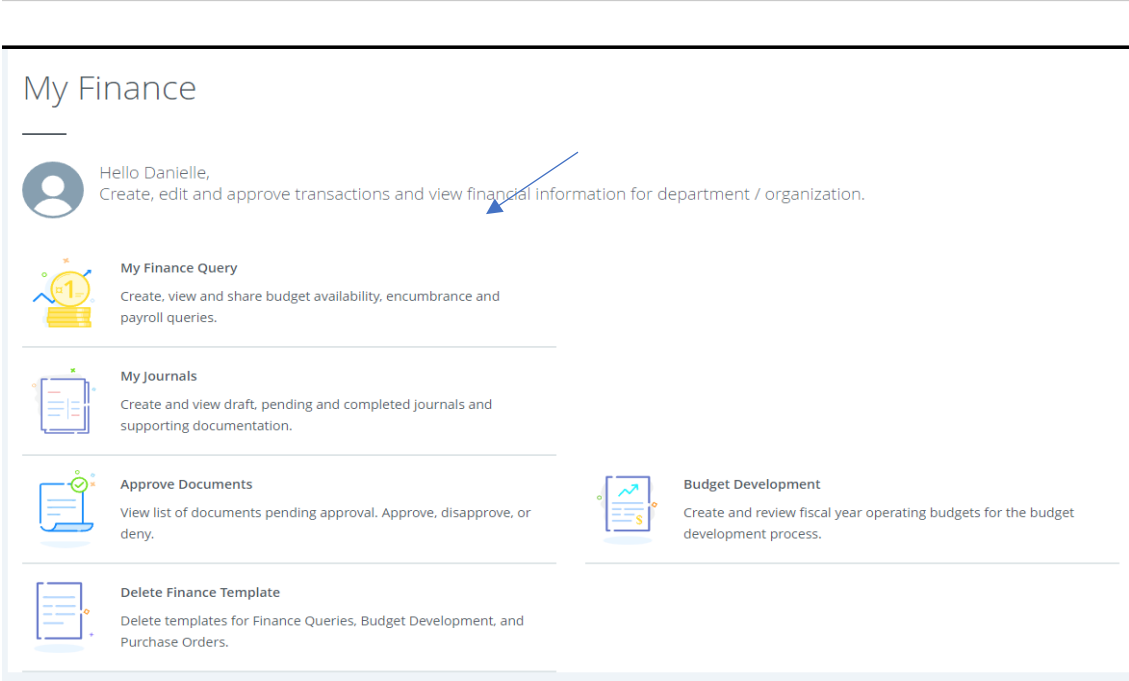
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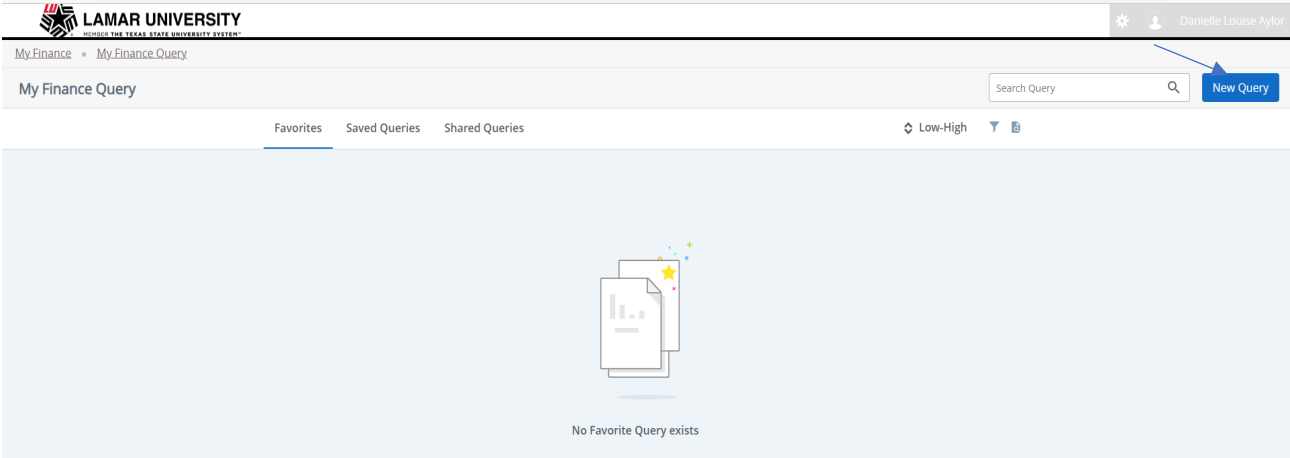
Lamar University

Creating a Self-Service Budget Query

3. Click on the 'My Finance Query'



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



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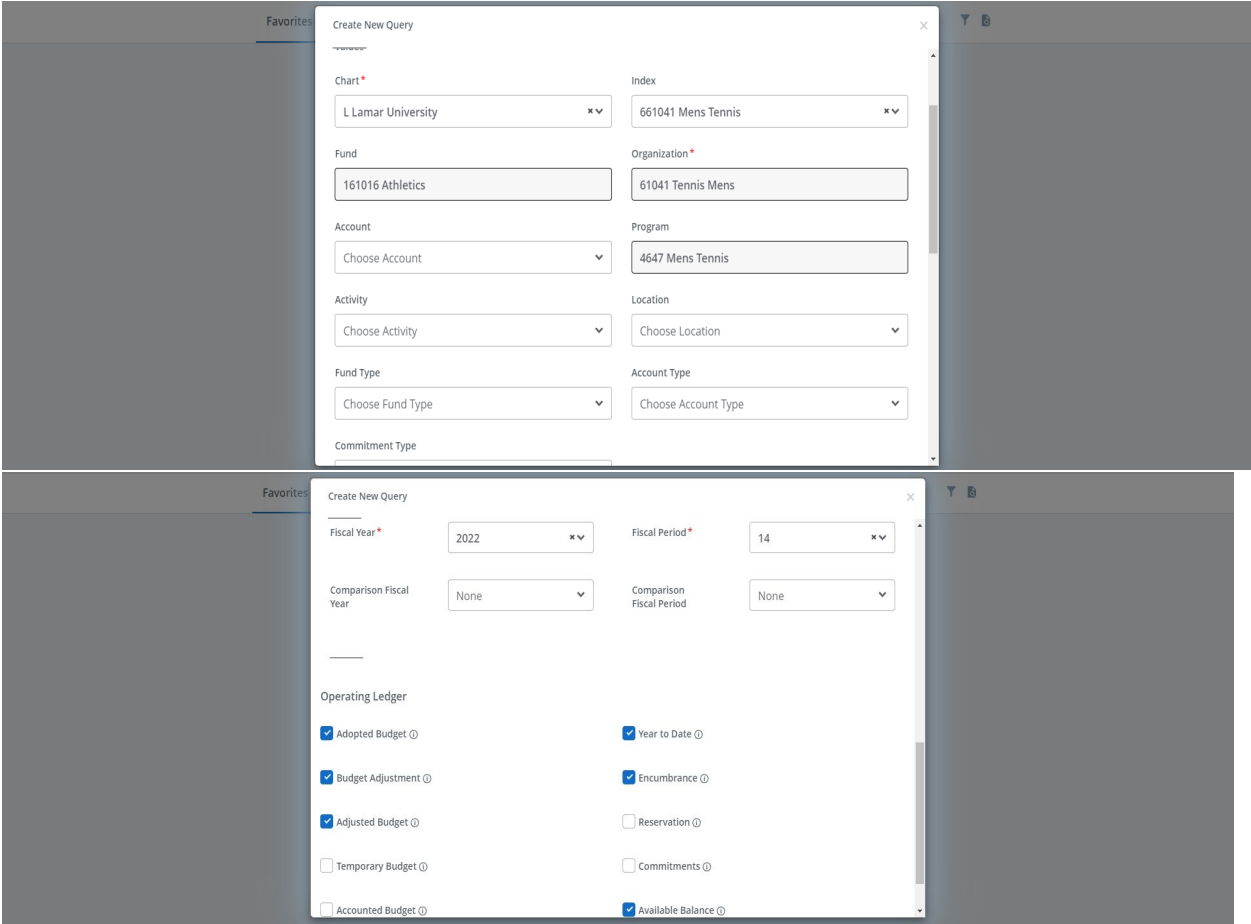
5. From the 'Select Query Type' dropdown list, click 'Budget Status by Organizational Hierarchy'. Fill out the following.
 - a. Chart: L (always will be L)
 - b. Index: Type in your 6-digit Index (i.e., 661041)- It will automatically populate Fund, Org, and Program
 - c. Confirm 'Fiscal Year' is the 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.

The screenshot shows a 'Create New Query' dialog box. The 'Select Query Type' dropdown is open, with 'Budget Status by Organizational Hierarchy' selected. The form fields are as follows:

Field	Value
Index	661041 Mens Tennis
Organization	61041 Tennis Mens
Account	Choose Account
Program	4647 Mens Tennis
Activity	Choose Activity
Location	Choose Location

Lamar University

Creating a Self-Service Budget Query



Lamar University

Creating a Self-Service Budget Query

- 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 Organizational Hierarchy

Budget Status by Organizational Hierarchy New Query

< Men's Tennis

Query Results

Organization	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 Finance • My Finance Query • Budget Status by Organizational Hierarchy

Budget Status by Organizational Hierarchy New Query

< Men's Tennis

Query Results

Account Type	FY22/PD14 Adopted Budget	FY22/PD14 Budget Adjustment	FY22/PD14 Adjusted Budget	FY22/PD14 Year to Date	FY22/PD14 Encumbrances	FY22/PD14 Available Balance
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)

- 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.

My Finance • My Finance Query • Budget Status by Organizational Hierarchy

Budget Status by Organizational Hierarchy New Query

< Men's Tennis

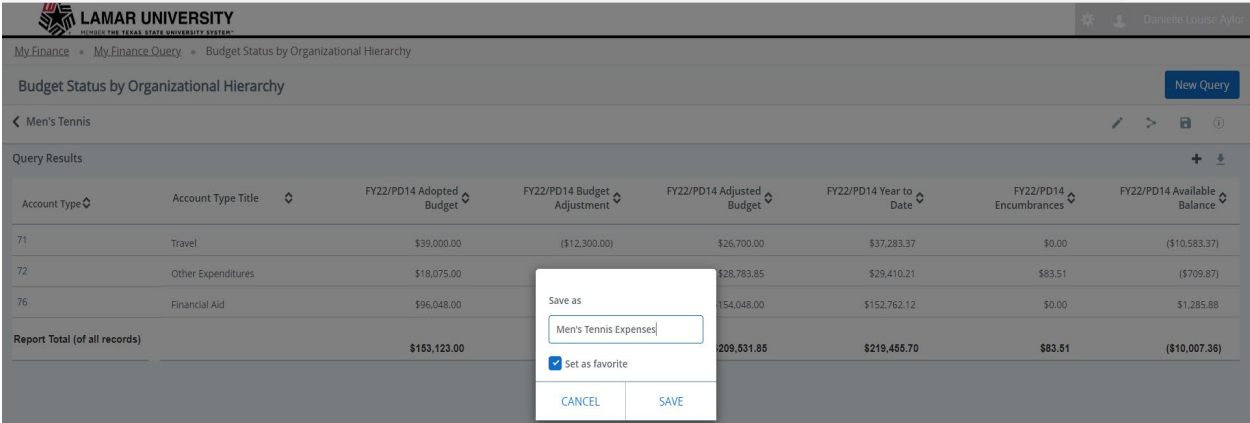
Query Results

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 Balance
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)

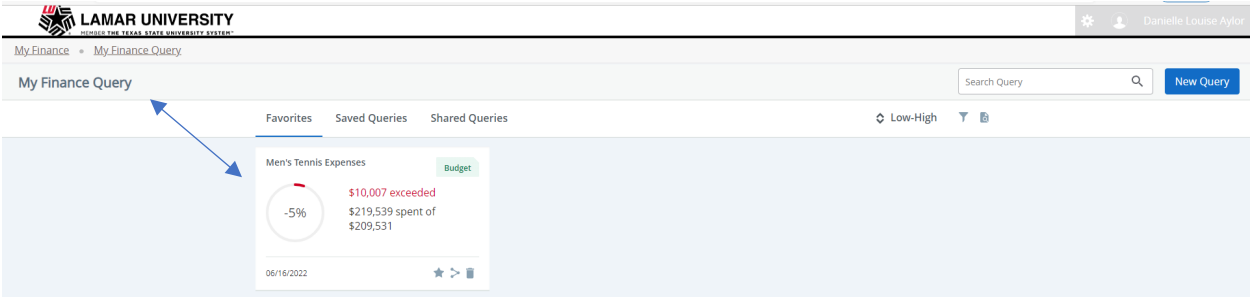
Lamar University

Creating a Self-Service Budget Query

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



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



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 budget@lamar.edu.