

BUDGET QUERIES USING SELF-SERVICE BANNER (Auxiliary Fund Budgets)

Budget Status by Account

University of North Alabama
Auditing and Finance
(256)765-4699

This guide will assist Banner Finance Self-Service end users with querying auxiliary fund budgets to determine current budget status.

1. Log into your UNA Portal. Once here, select the "Self Service Budget Query" option:



2. You will now be taken to the next screen where you will select "New Query" :

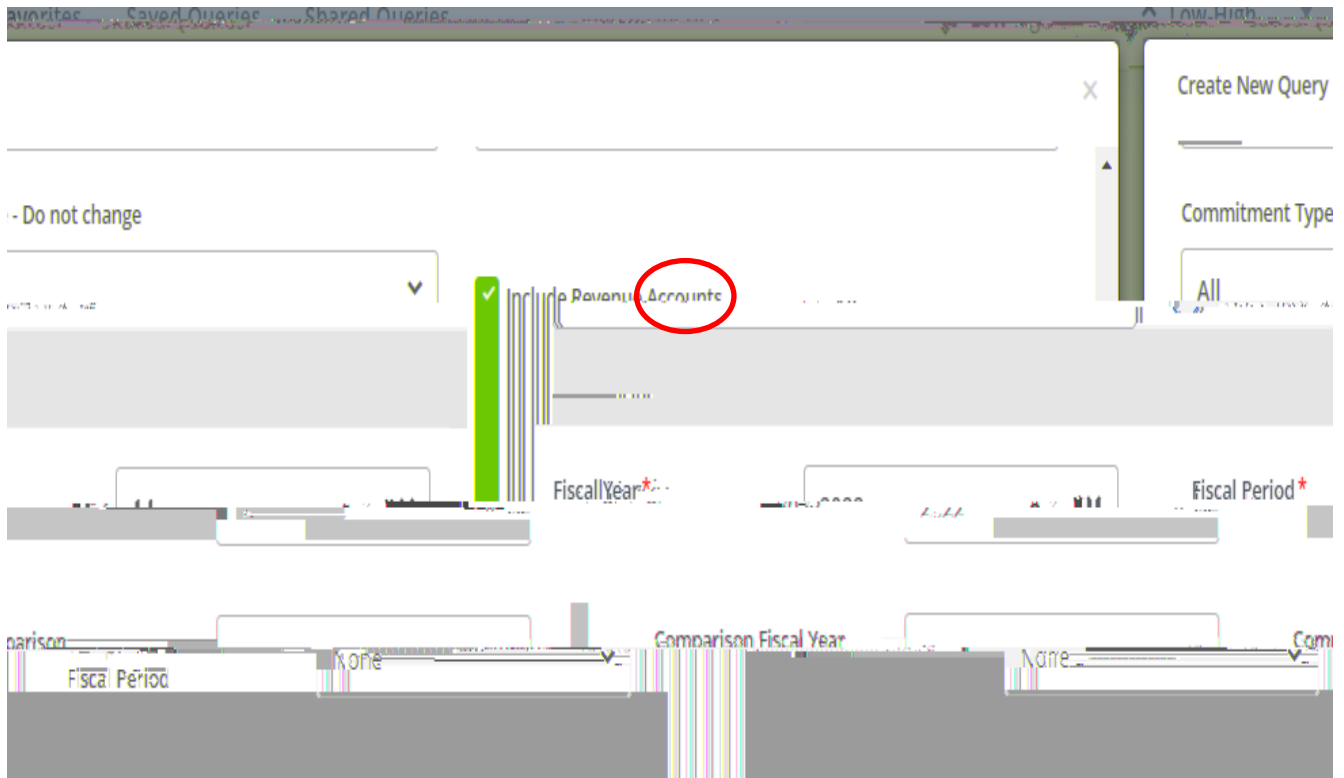


3. This pop-up box should appear:

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

Select Query Type: "Budget Status by Account"

Chart:



- 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:

