

Self-Service Banner – used for both Budget Query and Budget Development

Self Service Banner upgrade to will take place AFTER Native Banner Upgrade is complete. Stay tuned for conversion date

Budget Queries

After Accounting and Financial Services has set up security access according to the Finance Security Addendum, the “Finance” tab will be visible to Budget Administrators and Budget Managers under the Employee Tab through the Samford Portal.

- Under Samford Quick Links – select Portal
- Login
- Select Banner (Self Service)
- Select Finance
- Select Budget Queries
- Under drop down menu for Query Type, choose either: **Quick Query, Budget Status by Account, or Budget Status by Organizational Hierarchy.**
 - A **Quick Query** includes financial information for one fund/org posted for the current fiscal year to date.
 - A **Budget Status By Account Query** is like a Quick Query, but allows you to view financial information for a previous time period (month-end) for a given fiscal year.
 - A **Budget Status by Account Query** returns financial information for a rollup (multiple orgs) An example would be a school rollup consisting of multiple departments.
- Update criteria
 - Fiscal Year
 - Chart of Accounts – Select S
 - Fund
 - Org
 - Check box for Revenue if needed
- Save Query as: Name and save query if desired
- Select Submit Query

Coming Soon – Video Tutorial on running Budget Queries in Self-Service Banner 9 pending upgrade.

In the meantime, please contact the Office of Decision Support and Financial Strategy for questions regarding Budget Queries.