

Sul Ross University

Creating a Self-Service Budget Query

1. Log into Self Service Banner:

The screenshot shows the Sul Ross University website homepage. At the top, there is a navigation bar with links for Email, OneDrive, Blackboard, My Degree Plan, MYRSRU HOME, LTAC (TECH HELP), UCTV, CONTACT SRSU, and RESLIFE MAINTENANCE REQUEST. The main content area includes a large blue rectangle on the left, a central graphic with a target icon and the text '2022-2027 SRSU Strategic Plan: Our Student-Centric Focus', and a wolf head logo. A 'Quick Links' sidebar is on the right, listing INFORMATION, SERVICES, CAMPUS LIFE, and RESOURCES. Below the main content, there are four navigation sections: 'my Account', 'my Courses', 'Student Services', and 'SR Info'. The 'SR Info' section contains links for Course Information (HB2504), Faculty and Staff Directory, and Banner. A blue arrow points to the 'Banner' link.

2. Open 'Finance Dashboard' under Banner PROD:

Contact our [Help Desk](#)

Banner PROD

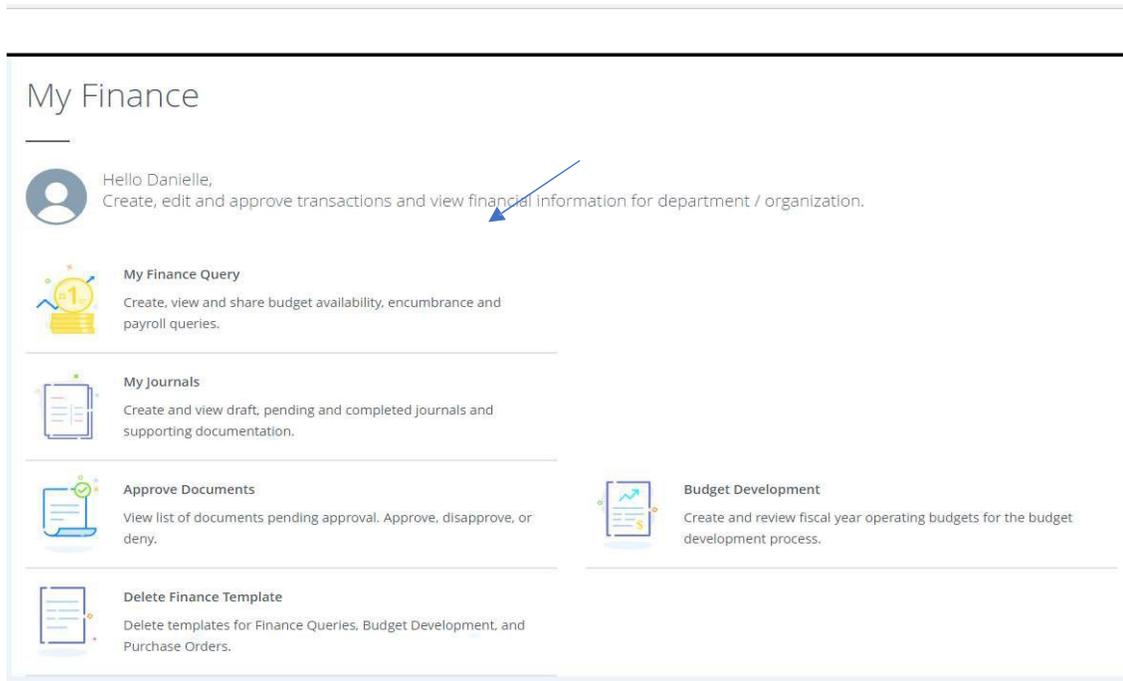
Please click on the link(s) below to access Banner PROD. You will need to use your loboid in order to access the system.

- [Banner 9 Admin Pages](#) (Must be on-campus or VPN to access)
- [Apex Reports & Applications](#) (Must be on-campus or VPN to access)
- [Evisions \(Argos, FormFusion, IntelliCheck\)](#) (Must be on-campus or VPN to access)
- Lobo Online
 - [Faculty / Advisor Dashboard](#)
 - [Student Dashboard](#)
 - [Employee Dashboard](#)
 - [Finance Dashboard](#)
 - [Direct Timesheet Link](#)
- [Blackboard](#)
- [Degreeworks](#)

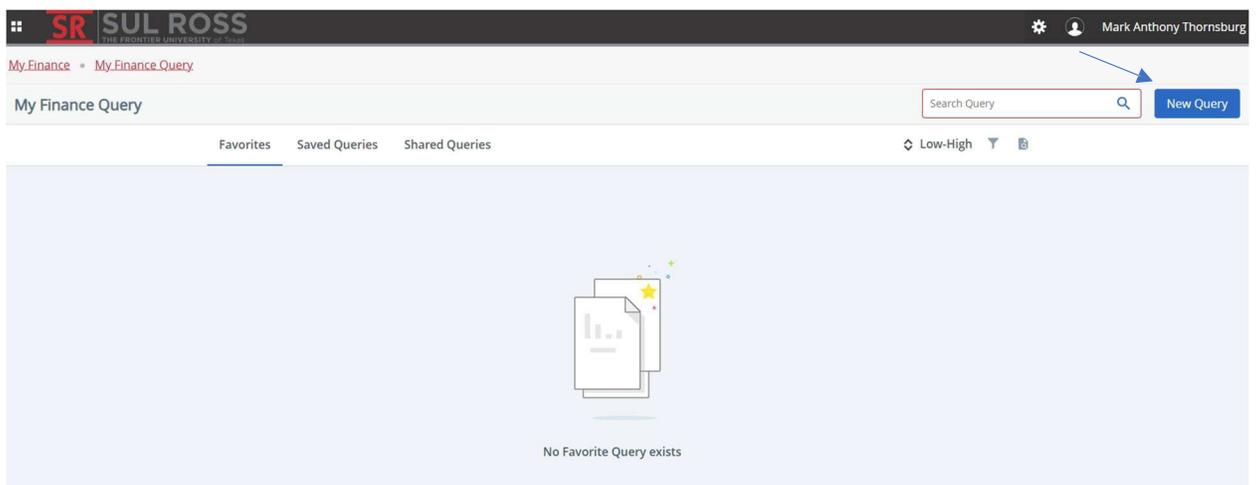
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3. Click on the 'My Finance Query'



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: U (always will be U)
 - b. Fund: Enter in Fund number and click on it when it appears.
 - c. Organization: Enter the Organization and click on it when it appears.
 - d. Program: Enter in Program and click on it when it appears.
 - e. Confirm 'Fiscal Year' is the current fiscal operating year.
 - f. Confirm 'Fiscal Period' is set to '14'.
 - g. 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
 - h. 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. Below the dropdown, there are several input fields: 'Index' (661041 Mens Tennis), 'Organization*' (61041 Tennis Mens), 'Program' (4647 Mens Tennis), 'Account' (Choose Account), 'Activity' (Choose Activity), and 'Location' (Choose Location). The background shows a sidebar with 'Favorites' and 'Men's Tennis' sections.

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Chart *
U Sul Ross State University x v

Index
Choose Index v

Fund
142100 Designated Tution - ALP x v

Organization *
100100 President x v

Account
Choose Account v

Program
Choose Program v

Activity
Choose Activity v

Location
Choose Location v

Fund Type
Choose Fund Type v

Account Type
Choose Account Type v

Commitment Type
All v

Include Revenue Accounts

Create New Query x

Fiscal Year * 2026 x v

Fiscal Period * 14 x v

Comparison Fiscal Year None v

Comparison Fiscal Period None v

Operating Ledger

Adopted Budget ⓘ

Budget Adjustment ⓘ

Adjusted Budget ⓘ

Temporary Budget ⓘ

Accounted Budget ⓘ

Year to Date ⓘ

Encumbrance ⓘ

Reservation ⓘ

Commitments ⓘ

Available Balance ⓘ

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- 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		\$28,783.85	\$29,410.21	\$83.51	(\$709.87)
76	Financial Aid	\$96,048.00		154,048.00	\$152,762.12	\$0.00	\$1,285.88
Report Total (of all records)		\$153,123.00		209,531.85	\$219,455.70	\$83.51	(\$10,007.36)

Save as

Men's Tennis Expenses

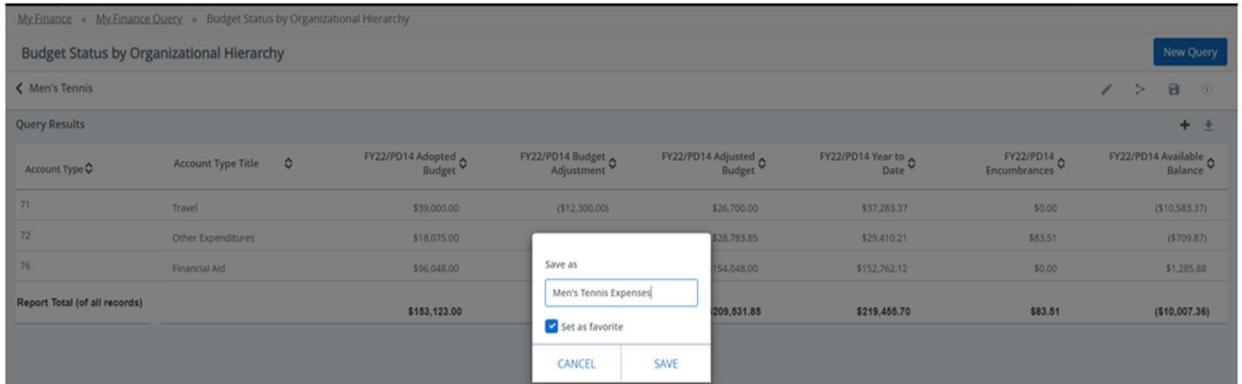
Set as favorite

CANCEL SAVE

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



The screenshot shows the 'Budget Status by Organizational Hierarchy' page. A table displays budget data for 'Men's Tennis' across various account types. A 'Save as' dialog box is open, allowing the user to name the query 'Men's Tennis Expense' and check the 'Set as favorite' option.

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		\$8,783.85	\$29,410.21	\$83.51	(\$709.87)
76	Financial Aid	\$96,048.00		\$54,048.00	\$152,762.12	\$0.00	\$1,285.88
Report Total (of all records)		\$153,123.00		\$89,531.85	\$219,455.70	\$83.51	(\$10,007.36)

9. After a query has been saved it will show up under favorites in 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 Office at SR.Budget@sulross.edu.