Performing a Budget Query

Introduction

The Budget Query option permits the Finance Self-Service user to access the same information they would review online using the Executive Summary Page (FGIBDSR) or the Banner Baseline form (FGIBDST) forms, for Budget Status. As is also true for those online forms, the data selected through a Finance Self-Service query can be downloaded to a Microsoft Excel spreadsheet.

A user may build or retrieve three types of queries:

- Budget Query by Account
- Budget Query by Organizational Hierarchy
- Budget Quick Query.

Users may choose from the following Operating Ledger Data for Budget Query by Account and Budget Query by Organizational Hierarchy:

- Adopted Budget
- Budget Adjustments
- Adjusted Budget
- Temporary Budget
- Accounted Budget
- Year to Date
- Encumbrances
- Reservations
- Commitments
- Available Balance.
Comparison queries

When users choose their desired parameters, they may select a Fiscal Period and Year to compare to the required Fiscal Period and Year. (Budget Quick Query only shows one fiscal year). With this selection, all the details that are retrieved will be placed next to the corresponding comparison Fiscal Period.

Downloading query data to a spreadsheet

Users can download budget query data to a Microsoft Excel spreadsheet and then edit it, according to their reporting needs.

Saving queries as templates

A query can be saved as a template on each screen. However, each time a query is saved, only the information entered and queried up until that point is saved. A user can enter a query and save it on each screen under a different name, creating several templates, each with its own detail or path.

This functionality enables the user to save the query and retrieve it later for quick reference or customizing. Queries may be saved as ‘Shared’ or ‘Personal.’ Other users may access ‘Shared’ queries; ‘Personal’ queries may be accessed only by the User who created them.

Note: You can use the Delete Finance Template link to delete your personal templates.

User-calculated columns

The detail screen provides the capability to add “user calculated columns” to a query. The user may add, subtract, multiply, divide, or get a percentage of any two Operating Ledger Columns, choose where they should be displayed, and name them. These columns may be removed, saved, or added from a query or template at any time.

Note: The User Calculated columns cannot be downloaded into Excel because they are just calculations.
**Budget query by account**

The Budget Query by Account option allows a user to review budget information by account for the Fiscal Period, Year to Date, and Commitment Type by

- Specific FOAPAL/Index values
- A Specific Organization
- All Organizations
- Grant
- Fund Type
- Account Type
- Revenue Accounts.

There are four levels to a Budget Query by Account: Account Detail, Transactions Detail, Document Detail, and View the Document.

**Budget query by organization hierarchy**

The Budget Query by Organization Hierarchy option allows users to review budget information for organizations:

- Hierarchical Structure
- Specific Funds, high-level Organizations, Accounts, and Programs
- Fund Type
- Account Type
- Revenue Accounts.
The levels of this type of query include

- Organizational Hierarchy
- External Account Type (Levels 1 and 2)
- Account Detail, Transaction Detail
- Document Detail
- View the Document.

**Budget quick query**

The Budget Quick Query mimics the output one sees from Banner Baseline form (FGIBDST). It is used to review budget information by Adjusted Budget, Year to Date, Commitments, and Available Balance by

- specific FOAPAL/Index values
- a specific organization
- all organizations
- grant
- revenue accounts.

The levels of this type of query do not allow any type of query for: Account Detail, Transaction Detail, Document Detail, or View the Document.
Steps

Follow these steps to complete the process.

1. Click **Budget Queries** from the Finance Menu to navigate to the Budget Query Page.

2. Under "Create a New Query," click the drop-down **Type** menu to view values.

   Select **Budget Status by Account** to view budget information for organizations detailed by account. You may wildcard either or both the organization or account (as well as other values, exc. Chart). This does not work with hierarchical organization or account codes.

   Select **Budget Status by Organizational Hierarchy** to view summarized budget information using actual or hierarchical organization or account codes.

   Select **Budget Quick Query** to view summarized budget information for organizations. This does not work with hierarchical organization or account codes.
3. After selecting a query type, click the **Create Query** icon.

4. Check the appropriate checkboxes for your query.

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5. Enter a name for your query in the **Save Query As** field.

   Note: Do not use the following non-standard characters in your query name. They are the semicolon (;), slash (/), ampersand (&), at sign (@), and question mark (?).

6. Check the **Shared** checkbox.

7. Click the **Continue** button.
8. Enter the appropriate parameters for your query.

Note: You must choose either a valid organization or a valid grant and chart of accounts to retrieve any data.

Query Budget Query 2005a (S) saved.

For a Budget Query to be successful, a user with Fund Organization query access must enter a value in either the Organization or Grant fields as well as the Fiscal Year, Period, and Chart of Accounts fields. If Grant information is queried, all retrieved information is Grant Inception to Date. Otherwise, all information retrieved is through the Fiscal Year to Date.

To perform a companion query select a Companion Fiscal Year and Period in addition to the required Fiscal Year and Period. With this selection, all details retrieved will be placed next to the corresponding companion fiscal period.

9. Save Query as ________________ to save the entire query for reuse.

10. Check the Shared checkbox.

11. Click the Submit Query button.

12. The page will refresh and display the results of your query, along with the parameters that were selected.