



Budget Query by Account in Self Service Banner (SSB)

1. Click **Budget Queries** from the Finance Menu
2. Under “create a new Query” click drop-down type menu to view values
3. Select **Budget Status by Account** to view budget information for organizations detail by account
4. After selecting a query type, click the **Create Query** icon
5. Select the operating ledger data to display on the report
 - *Adopted Budget
 - *Budget Adjustment
 - *Adjusted Budget
 - *Year to Date
 - *Encumbrances
 - *Reservations
 - *Commitments
 - *Available Balance
6. If you wish to save your query - Enter a name for your query in the **Save Query AS** field
7. Click the continue button
8. Enter the appropriate parameters for your query (you must choose either a valid organization or valid grant and chart of accounts to retrieve any data)
9. Enter Fiscal Year
10. Enter Fiscal Period (use 14 to see whole year)
11. Enter comparison data if you want to compare years or periods
12. Leave commitment type to ALL
13. Chart of Accounts always = C
14. Enter your organization code
 - *To query org code – click on organization, in the title use % department name % and click execute query (example %Finance%)*Double click organization code and it will return to query
15. If budget has revenue click include revenue
16. Click submit Query
17. Budget report is displayed
18. To view detail click on items in blue and it will return the detail of the transactions (As long as you see blue you can keep drilling down)

*Report can be exported to an excel spreadsheet by clicking **Download all ledger columns**