

The more modern Budget Query method is in Finance Self-Service. Go to the following link: <https://www.muw.edu/its/banner-help>

Now, click Finance Dashboard. You will see a page similar to this:

The screenshot shows the 'My Finance' dashboard. At the top left, there is a user profile icon and the text 'Hello Aaron, Create, edit and approve transactions and view financial information for department / organization.' Below this, there are several tiles for different financial functions:

- My Finance Query**: Create, view and share budget availability, encumbrance and payroll queries.
- My Journals**: Create and view draft, pending and completed journals and supporting documentation.
- Approve Documents**: View list of documents pending approval. Approve, disapprove, or deny.
- Delete Finance Template**: Delete templates for Finance Queries, Budget Development, and Purchase Orders.
- My Requisitions**: Create and view draft, pending and completed requisitions and supporting documentation.
- Purchase Orders**: Create purchase orders or purchase orders in process.
- Budget Development**: Create and review fiscal year operating budgets for the budget development process.

If you do not see all of these boxes, it is okay, as you may not have privileges for the rest...please select **“My Finance Query”**.

You should see something similar:

The screenshot shows the 'My Finance Query' interface. At the top, there is a breadcrumb trail: 'My Finance > My Finance Query'. Below this, there is a search bar with the text 'Search Query' and a magnifying glass icon, and a blue button labeled 'New Query'. Underneath the search bar, there are three tabs: 'Favorites', 'Saved Queries', and 'Shared Queries'. At the bottom of the interface, there is a 'Low-High' sorting option and a small icon.

From here, you can create queries, save queries, favorite queries, and share queries. Let's Create! Click the Blue "New Query" button at the top right. You should get a similar pop-up box:

Create New Query

Select Query Type

Budget Quick Query

Values

Chart* U Mississippi University for Women x v

Index Choose Index v

Fund 10 General Fund x v

Organization* 609000 Information Systems x v

Account Choose Account v

Program Choose Program v

Activity Choose Activity v

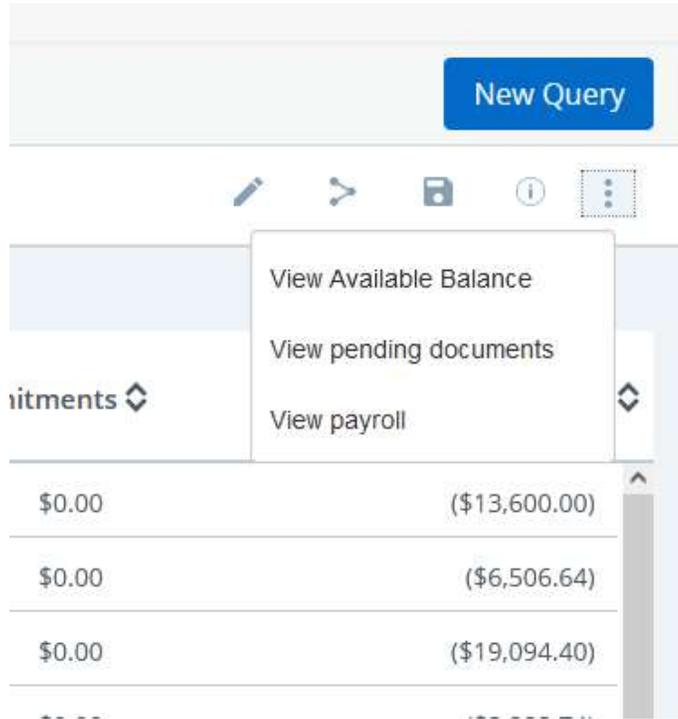
Location Choose Location v

There are multiple query templates already created, and you can try various options to get the right look and feel that suits your need. Let's stick with the "Budget Quick Query" for now.

Verify the fields that have a red "*", as those are the required. Make sure they have your data. Scroll down, and double-check the Fiscal Year.

If all is well, click submit. Once your output appears, you get some options as to what to do with it.

At the top right, under the “New Query” button, you can select a number of options.



First off, you are allowed to sort by columns! Woot! Woot again! 🤖

The pencil icon allows you to refine your query selection.

The connected dots allow you to share this query and output with others.

The disk allows you to save this query with the exact specifications so you can quickly rerun at will.

If you click the vertical ellipses (dots), you get options to view more info associated with your query results.

You can also download/export the query results, by clicking the “down arrow” under the vertical ellipses.

