Banner 9SS Guide – My Finance Query



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**Type of Queries**

|  |  |
| --- | --- |
| **Query Type** | **Description** |
| Budget Status by Account | Budget information by accounts for the Fiscal Period, Year, and Commitment Type (all, committed, or uncommitted) by the following:* FOAPAL/Index values
* Single Organization
* Fund Type
* Account Type
* Revenue Accounts
* Wild-card filters supported for FOAPAL
 |
| Budget Status by Organizational Hierarchy | Budget information for organizations by the following:

|  |
| --- |
| * Hierarchical structure
* Specific Funds, high-level Organizations, Accounts, and Programs
* Fund Type
* Account Type
* Revenue Accounts
* Wild-card filters supported for FOAPAL
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| Budget Quick Query |

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| Current budget status and displays information similar to that available on the Organization Budget Status (FGIBDST) page. When you choose this option, be aware of the following:* Only one parameter page displays for this query. Ledger fields displayed include **Adjusted Balance**, **Year to Date**, **Net Commitments**, and **Available Balance**.
* Wild-card filters supported for FOAPAL.
* You can enter the fiscal year. Data displayed will be through period 14.
 |

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| Encumbrance Query | Budget information by encumbrance information for the Commitment Type (all, committed, or uncommitted), Encumbrance Status, and Fiscal Year and Period. |
| Multi Year Query | New Query type to support the current budget status by Grant which displays information similar to that available on the Grant Inception to Date (FRIGITD) in the admin application. Wild-card filters supported for FOAPAL. |
| Payroll Expense Detail  | Allows you to review the entire payroll distribution data for the Fiscal year and Fiscal period by:

|  |
| --- |
| * FOAPAL/Index values
* Single Organization
* Fund Type
* Account Type
* Wild-card filters supported for FOAPAL
 |

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**Create a Query**

To begin the query process, use the My Finance Query dashboard page to create a query. The various types of queries available are outlined on page 2.

**Procedure**

1. On the **My Finance Query** page, click **New Query**.
2. On the **Create New Query** window, in the **Select Query Type** field, select the budget query type.
3. In the **Values** area, select the values and the Operating Ledger columns for which you want to query.
4. Click **SUBMIT**.

Result: The query results display on the page. Using the available icon buttons, you can edit, share, save, view query parameters, add computed columns, download results to Excel, or view available balance, pending documents, and payroll (if applicable).

**Save a Query and Mark it as a Favorite**

**Procedure**

1. Create a query that you want to save.
Result: The query results display on the page.
2. Click  to access the **Save as** window.
3. Enter a query name in the provided field.
4. If you want to set the query as a Favorite, select the **Set as favorite** check box.
5. Click **Save**.
Tip: You can also use the  icon of a query displayed in the card view to toggle a query between Favorite and Unfavorite.

**Edit a Query**

Procedure

1. On the **My Finance Query** dashboard page, click the **Saved** or **Shared** query you want to edit.

Result:

• Clicking saved queries loads query results. Click  to access the **Edit Query** window.

• Clicking a shared query in the query list accesses the **Edit Query** window.

1. Using the **Edit Query** window, adjust the selections for the query.
2. Click **SUBMIT.**

**View available balance, pending documents,
and payroll expense detail**

You can view pending documents attached to a query. You can also view payroll expense detail.
*Note: Payroll expense detail is available to users based on permission level access.*

**Procedure**

1. View the query.
2. Click  to access the options list.

|  |  |
| --- | --- |
| Option | Description |
| View available balance | The system presents with Available Balance information (similar to FGIBAVL in Admin) based on the query parameters and the Budget Control Keys configured. |
| View pending documents | The system presents a list of pending documents associated with the query. |
| View payroll | The system presents payroll information, based on your permission level. |

**Share a Query**

Sharing a query allows anyone in your organization who has the same level of access to see the query.

**Procedure**

1. On the **My Finance Query** dashboard page, locate the query you want to share in the Favorites or Saved areas.
2. Click .
3. On the share prompt, choose the appropriate option

|  |  |
| --- | --- |
| Option | Description |
| Yes | The system updates the query to Shared allowing others with the same level of access to see the query. |
| No | The system cancels the share.  |

Result: You will now see the  icon which indicates that the query has been shared.

4. You can click on  to unshare the query.

Tip: You can also perform the Share/UnShare operation, while running a query from the Query results listing page.

**Download a Query to Excel**

You can download a query as an Excel spreadsheet.

**Procedure**

1. Create or view a query that you want to download.
2. Click  to download the query to the default download location on your local drive.

**Delete a Query**

You can delete saved queries.

**Procedure**

1. On the **My Finance Query** dashboard page, click **Saved Queries**.
2. Locate the saved query you want to delete and click  .
3. On the delete prompt, choose the appropriate option.

|  |  |
| --- | --- |
| Option | Description |
| Yes | The system deletes the query. |
| No | The system cancels the delete. |

**Add Computed Column**

You can add a computed column to query results.

*Note: You can add a computed column to all query types* ***except*** *Budget Quick Query.*

**Procedure**

1. Create or view the query to which you want to add a computed column.
2. Click  to access the **Computed Columns** window.
3. Define the computed column by naming it and selecting the two columns and the operator controlling the new column's results.
4. Click **Compute**.

Result: Query results reload listing the new computed column in the results.

*Tip: You can use the* ***Remove*** *tab to remove a previously added computed column from a query.*

**View a Document – Option 1**

You can use these steps to view a document from the **My Finance Query** dashboard.

**Procedure**

1. Click the **Document Type** drop down to select the appropriate document type.
2. To look up a transaction document, use either of the following methods to populate the **Document Number** field:
	* Click the **Document Search** drop down to begin typing and select a document number from the list, or
	* Type the document number directly into the **Document Number** field.
	* Click the **Document Number Lookup** icon to do an advanced search for a document using the available criteria.
3. After identifying a document number to view, you can:
	* Click **VIEW DOCUMENT** to open the document as a PDF.
	* Click **APPROVALS & RELATED DOCUMENTS** to view related documents, attachments, and approval information.

**View a Document – Option 2**

You can use these steps to view a document from the **Query Results** page in drill-down view.

**Procedure**

1. Drill down to the query that you want to view the transaction details for.

For example: **My Finance Query** > **Multi Year** query.

1. On the **Query Results** page, drill down further by clicking on a budget figure against the query.

For example: **$40,000.00**

Result: This will open the budget transaction details for that query.

1. Click **Document Code** to open the details as a PDF.

Note: You can click **View Parameters** to view the approval information, related documents, and attachments.