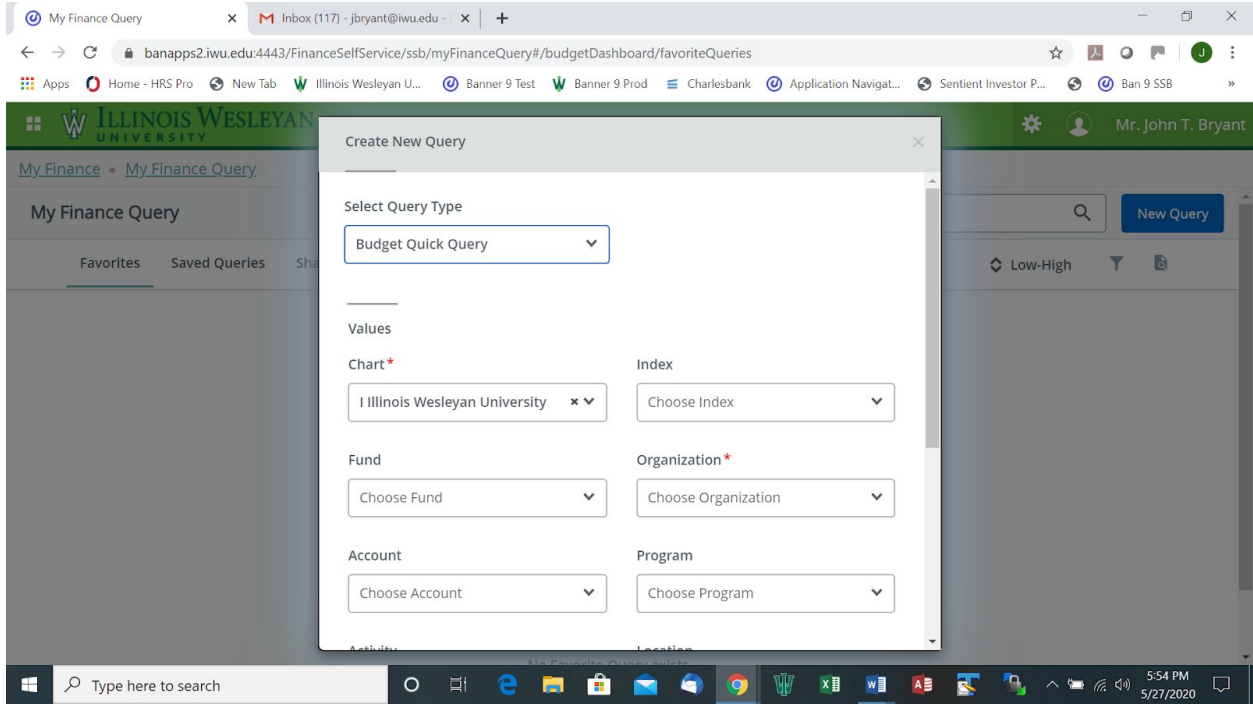


With the new Banner 9 My Finance Dashboard, available from [MyIWU](#), Finance queries can now be saved and shared with others who have access to the same budget codes.

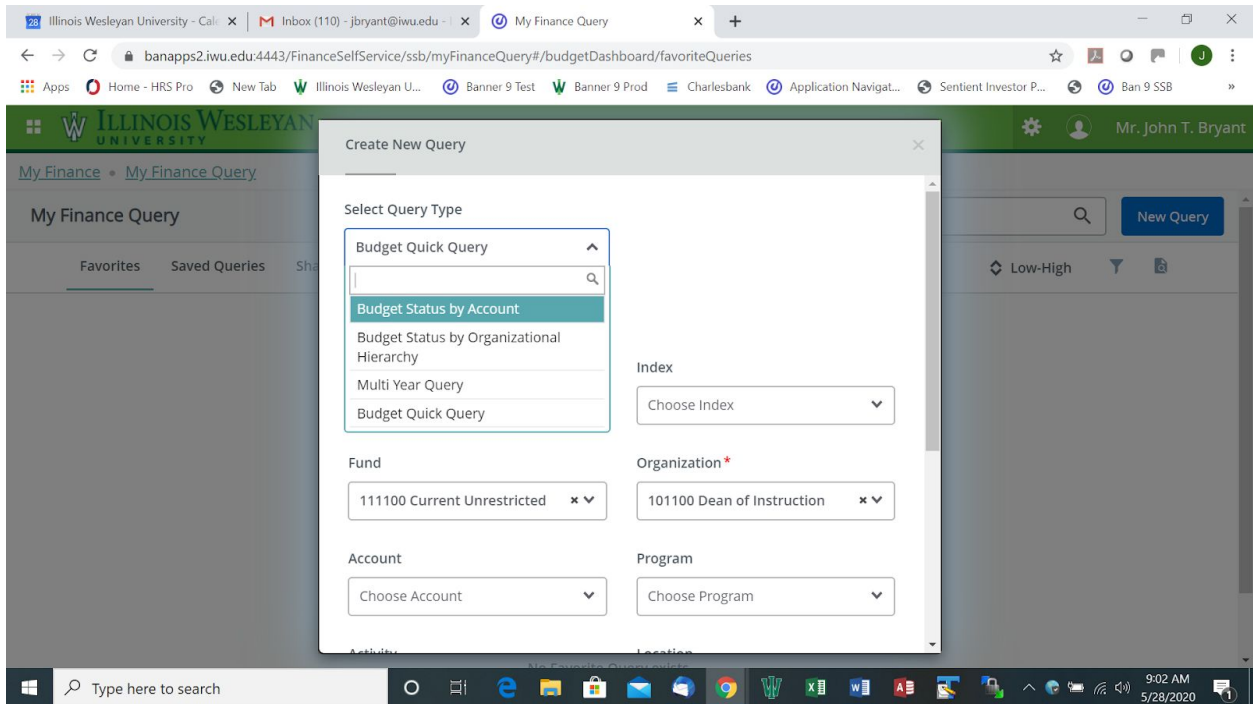
Selection criteria and security access remain the same.

See screen shots and instructions below:

Click on the New Query tab, upper right in blue, and it will allow you to select the type of query to run.

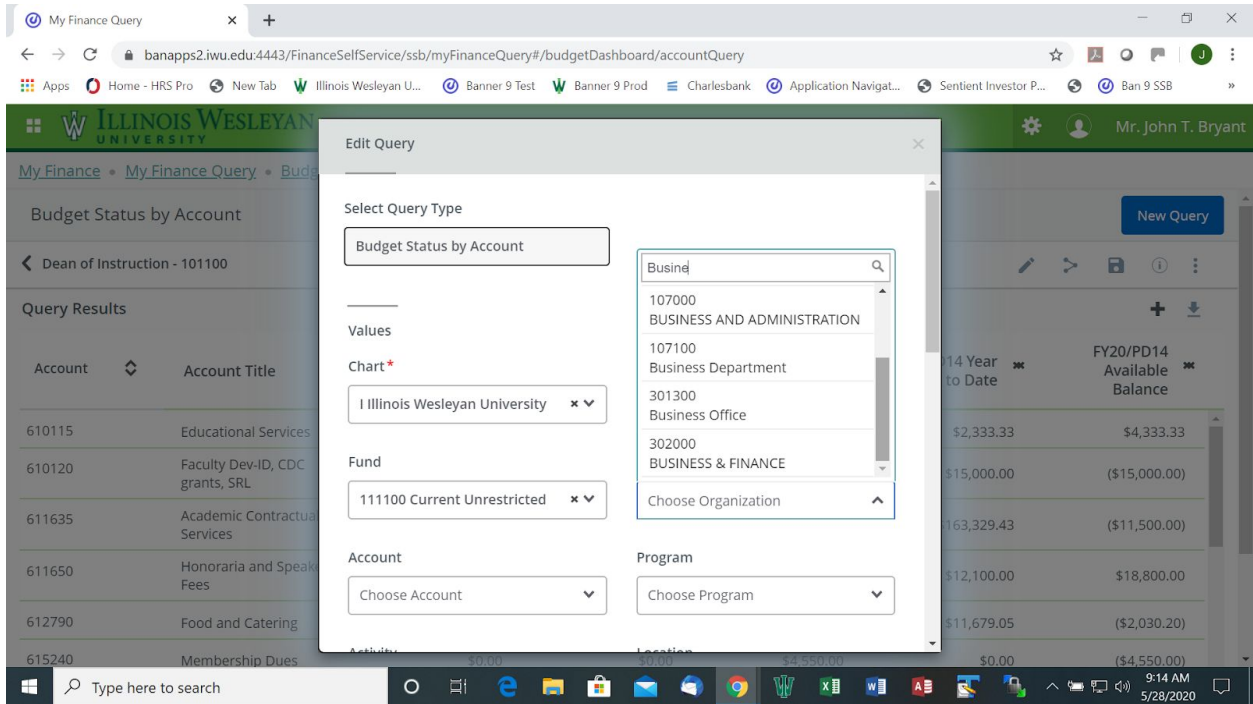


Budget Status by Account allows you to run department budget reports. Selection criteria remains the same as in Banner 8. You will need to scroll down to the bottom of the selection box to choose "Submit" to execute the query.

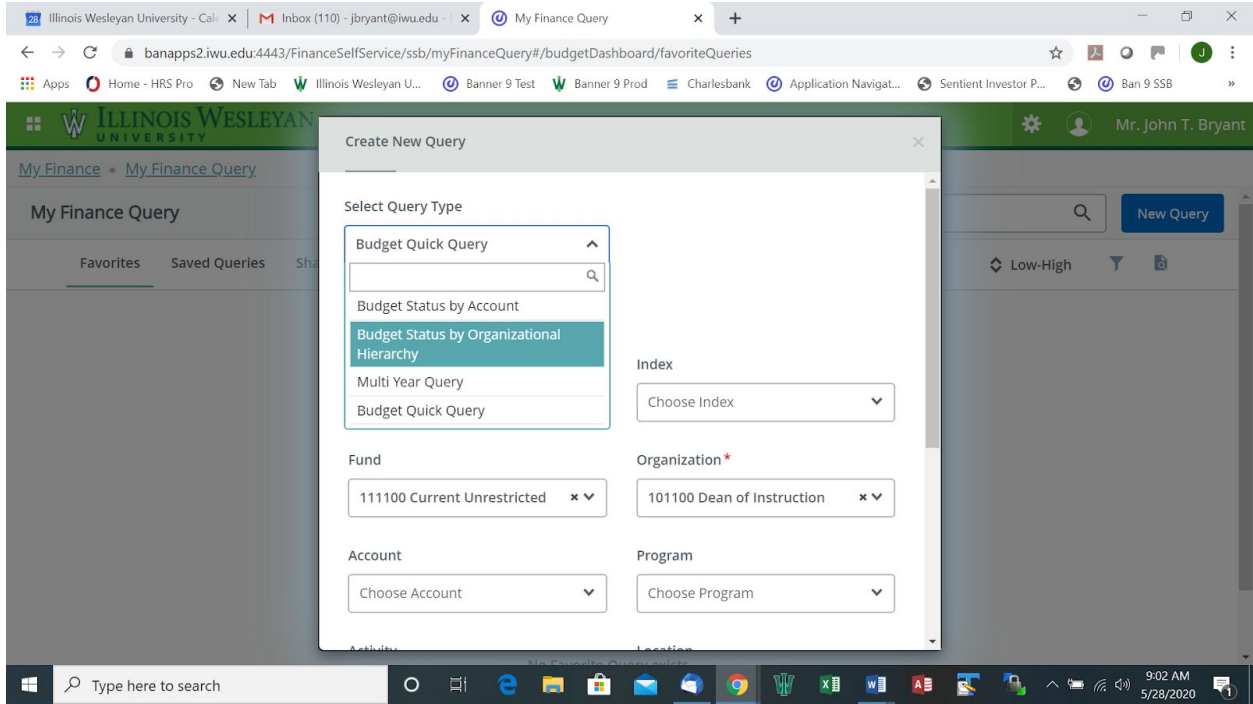


The Search criteria in each field is alpha numeric up to 6 characters. The alpha search feature has been added with Banner Self Service 9.





The wild card, %, can be used in any part of the account structure when running a query. For example, under Account, enter 6% to see all operational expenses excluding payroll.



The Budget Status by Organizational Hierarchy allows for higher-level reporting for those who have access to multiple budget codes. The Business Office will distribute new hierarchy codes to the appropriate individuals. Rollups are effective with Fiscal Year '20 and Fiscal Period 08. Previous reporting periods may not generate output.



Below New Query near the top right, the icons allow you to perform several functions. From left to right:

- The pencil icon  will return you to the Edit Query view.
- The share icon  will share the saved query with all users who have access to the budget codes in that query.
- The save icon  allows you to save a particular query to your favorites, and it will be available under the My Finance Query tab.
- The i in a circle icon  allows you to view the parameters of the current query.

My Finance Query

banapps2.iwu.edu:4443/FinanceSelfService/ssb/myFinanceQuery#/budgetDashboard/accountQuery

Mr. John T. Bryant

My Finance • My Finance Query • Budget Status by Account

Budget Status by Account New Query

Business Office - 301300 Edit Query

Query Results

Account	Account Title	FY20/PD14 Adopted Budget	FY19/PD14 Adopted Budget	FY20/PD14 Year to Date	FY19/PD14 Year to Date	FY20/PD14 Available Balance
617690	Supplies and Expense - General	\$42,000.00	\$14,232.00	\$3,613.50	\$8,341.54	\$38,386.50
617500	Subscriptions	\$0.00	\$345.00	\$0.00	\$0.00	\$0.00
616220	Publications Expense	\$0.00	\$221.00	\$0.00	\$0.00	\$0.00
615820	Photocopying - Xerox	\$0.00	\$3,096.00	\$0.00	\$0.00	\$0.00
611980	Connections Expense - Dev	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
611500	Conferences, Conventions, Meetings	\$0.00	\$1,631.00	\$0.00	\$2,371.71	\$0.00

9:20 AM 5/28/2020

If you have any questions on the navigation, please contact Linda Tuttle, Associate Controller, at [ltuttle@iwu.edu](mailto:ltuttle@iwu.edu) or John Bryant, Assistant Vice President and Controller, at [jbryant@iwu.edu](mailto:jbryant@iwu.edu).