Lamar University
Creating a Self-Service Budget Query

1. Log into Self Service Banner:

2. Click on the "Finance" Tab at the top and click on NEW Finance Self Service. Log in with your LEA username and password.
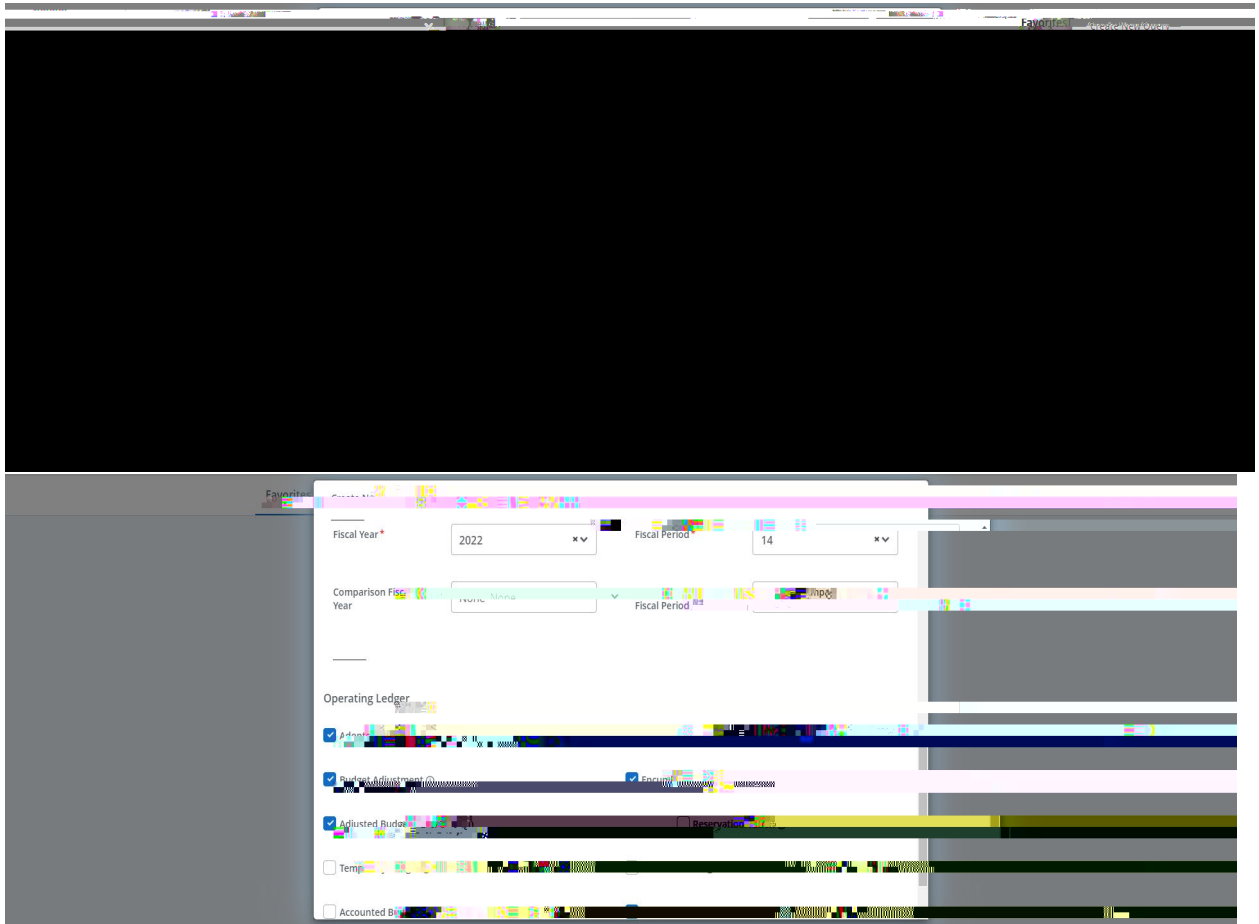
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5. From the 'Select Query Type' dropdown list, click 'Budget Status by Organizational Hierarchy'. Fill out the following

   a. Chart: L (always will be L)
   b. Index: Type in your 6-digit Index (i.e., 661041). It will automatically populate Fund, Org, and Program
   c. Confirm 'Fiscal Year' is the current fiscal operating year.
   d. Confirm 'Fiscal Period' is set to '14'.
   e. Scroll down and in the 'Operating Ledger' section, check the following:
      i. Adopted Budget
      ii. Budget Adjustment
      iii. Adjusted Budget
      iv. Year to Date
      v. Encumbrance
      vi. Available Balance
   f. Hit Submit.

6. Query Results screen will come up. You can get a more detailed view of your index in the query by clicking the hyperlink (highlighted blue).

7. Once you find query screen with the information you want to see, you can

8. Choose a name for the query, check 'Set as Favorite', and hit 'Save'.

9. After a query has been saved it will show up under 'My Finance Query' in the future when you log in.

Notes:
You can edit or delete a query at any time after it is created. 'Fiscal Year' will need to be updated on the saved query to the current fiscal operating year