



THE UNIVERSITY OF
ALABAMA IN HUNTSVILLE

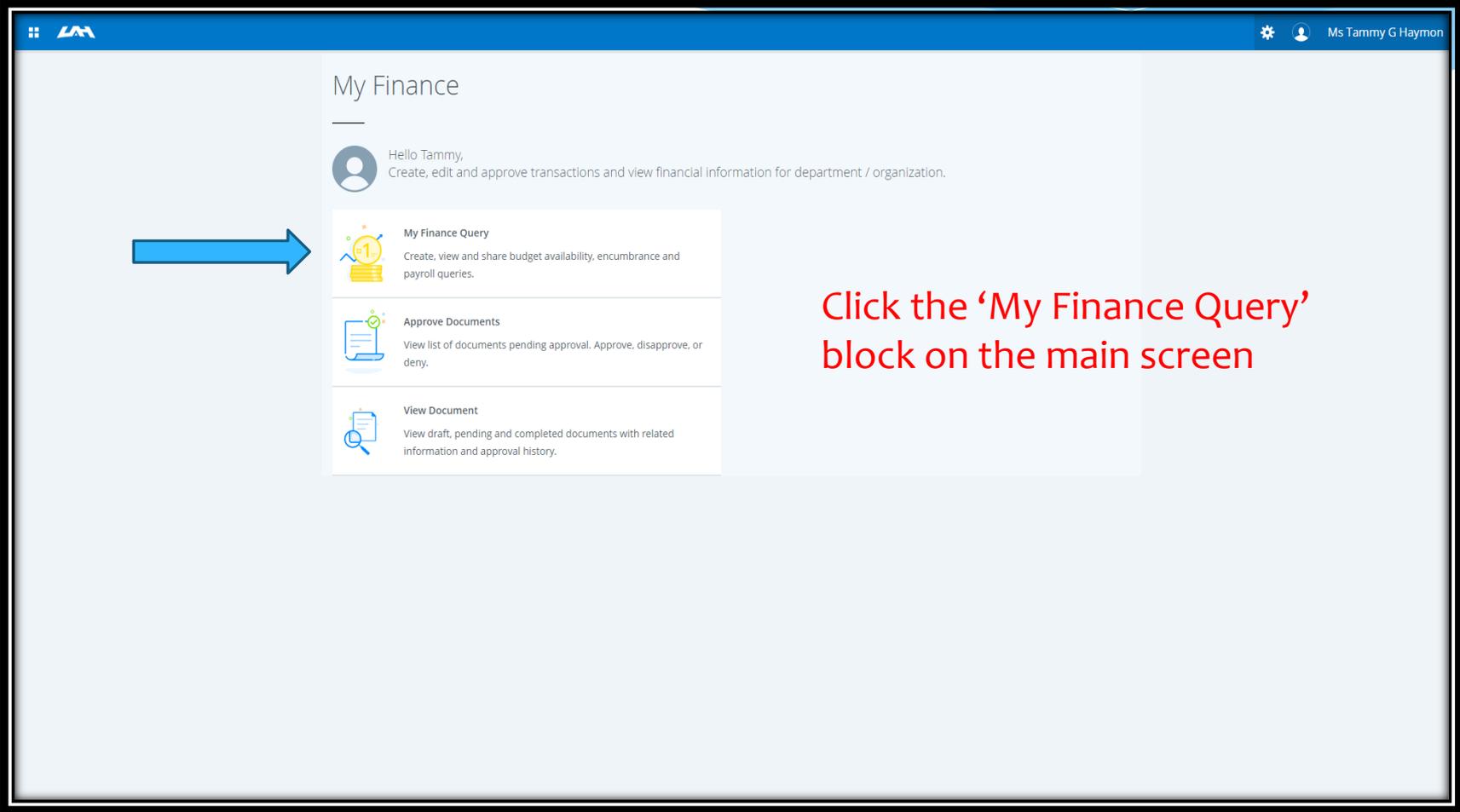
The University of Alabama in Huntsville
Office of Budgets and Management Information
Banner Finance Self-Service Training

Multi-Year Query

Lesson Objectives

- * Correctly set up the Multi Year Query.
- * Interpret a Multi Year Query accurately.
- * Determine when to use the Multi Year Query query by researching examples.

Finance Self-Service Multi Year Query

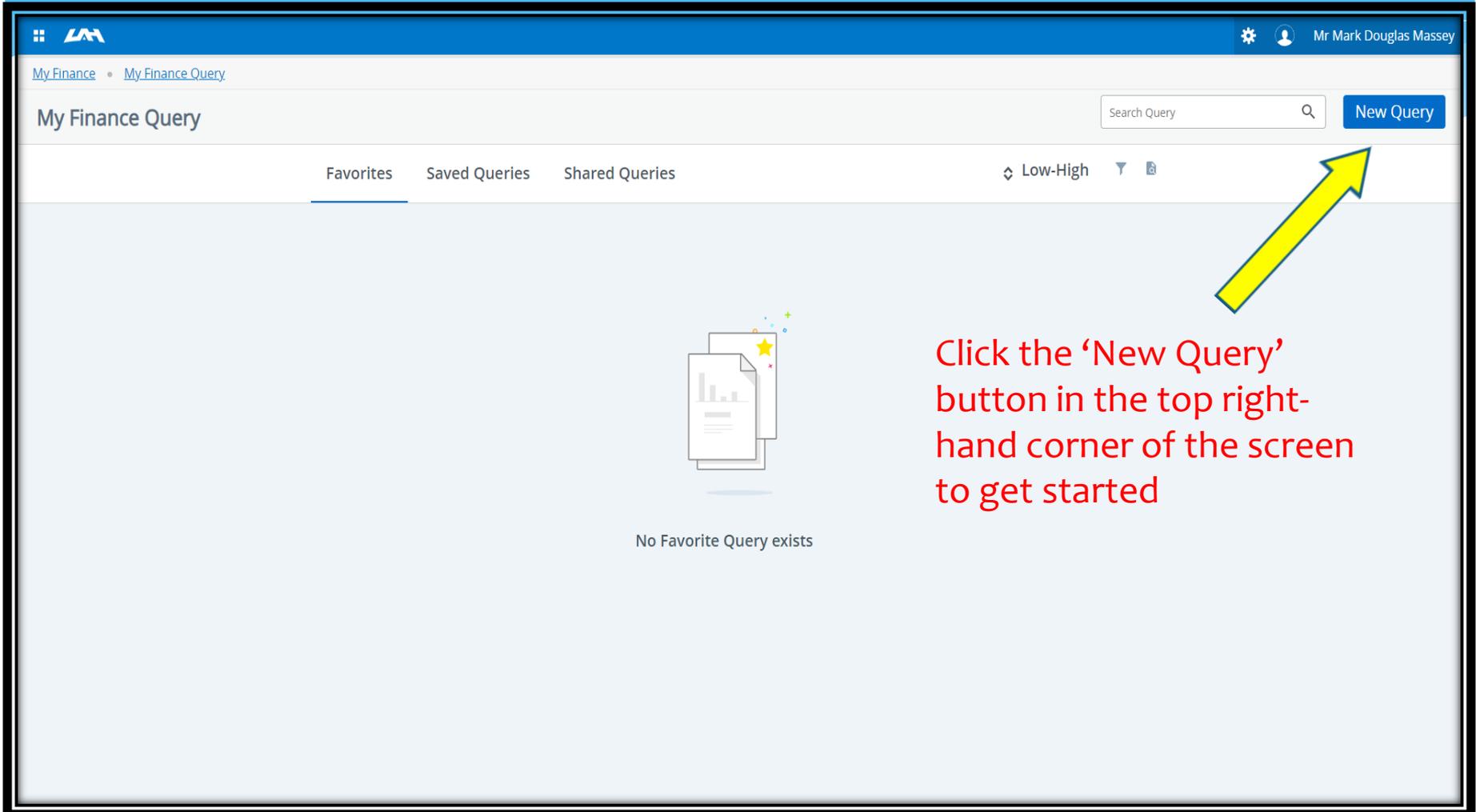


The screenshot shows a user interface for 'My Finance'. At the top, there is a blue header bar with a logo on the left and a user profile 'Ms Tammy G Haymon' on the right. Below the header, the main content area is titled 'My Finance'. Underneath this title, there is a greeting: 'Hello Tammy, Create, edit and approve transactions and view financial information for department / organization.' Below the greeting, there are three main blocks:

- My Finance Query**: Create, view and share budget availability, encumbrance and payroll queries. A blue arrow points to this block.
- Approve Documents**: View list of documents pending approval. Approve, disapprove, or deny.
- View Document**: View draft, pending and completed documents with related information and approval history.

On the right side of the dashboard, there is a red text instruction: **Click the 'My Finance Query' block on the main screen**.

Multi Year Query Setup



The screenshot displays a web application interface for 'My Finance Query'. The top navigation bar includes a logo on the left, a settings gear icon, a user profile icon labeled 'Mr Mark Douglas Massey', and a search bar with the text 'Search Query' and a magnifying glass icon. A prominent blue button labeled 'New Query' is located in the top right corner, with a yellow arrow pointing to it. Below the navigation bar, there are tabs for 'Favorites', 'Saved Queries', and 'Shared Queries'. The main content area shows a message 'No Favorite Query exists' with an icon of a document and a star. The text 'Click the 'New Query' button in the top right-hand corner of the screen to get started' is overlaid in red on the right side of the screenshot.

Multi Year Query Setup (new!)

Create New Query

Select Query Type

- Multi Year Query
- Budget Status by Account
- Budget Status by Organizational Hierarchy
- Payroll Expense Detail
- Encumbrance Query
- Multi Year Query**
- Budget Quick Query

Index

Choose Index

Grant*

New Query

First, if there is anything in the fields, clear it out. Then, enter the Org number in the Organization (not Index) field.

When you do, these fields will auto-populate as seen on the right:

- Fund Number
- Program Code (clear this)

Last, enter the Fund Number in the Grant field.

Create New Query

Select Query Type

Multi Year Query

Values

Chart*

H The University of AL in Huntsville

Fund

2B186 F/NSF/Renewal of the Scholarship fo

Organization

Enter Org No. Here

Program

10 Instruction

Index

This should remain blank.

Grant*

Enter Fund No. Here

Account

Choose Account

Activity

Choose Activity

Multi Year Query Setup

Create New Query

Date From* x v x v

Date To x v x v

Scroll down within the selection block. The beginning Contract/Grant date will auto populate, however, you can customize by selecting your own dates. **Note: These are calendar year months, not fiscal year months.** (e.g. 04=April, not January)

Grant Ledger

<input type="checkbox"/> Adopted Budget ⓘ	<input checked="" type="checkbox"/> Year to Date ⓘ
<input type="checkbox"/> Budget Adjustment ⓘ	<input checked="" type="checkbox"/> Encumbrance ⓘ
<input type="checkbox"/> Adjusted Budget ⓘ	<input checked="" type="checkbox"/> Reservation ⓘ
<input type="checkbox"/> Temporary Budget ⓘ	<input type="checkbox"/> Commitments ⓘ
<input checked="" type="checkbox"/> Accounted Budget ⓘ	<input checked="" type="checkbox"/> Available Balance ⓘ

SUBMIT

- Recommended Operating Ledger Columns**
- **Accounted Budget-** Budget as of 'today'
 - **Year-to-Date-** Transactions that have hit the Organization Code as of today
 - **Encumbrances-** Purchase Orders (PO's-Type of Commitment)
 - **Reservations-** Requisitions (Type of Commitment)
 - **Available Balance which is =**
Accounted Budget minus Year-to-Date, Encumbrances, and Reservations

Reading the Multi Year Query

[My Finance](#) • [My Finance Query](#) • [Multi Year Query](#)

Multi Year Query New Query

Org Title and Fund #

Query Results

Account	Account Title	Accounted Budget	Year to Date	Encumbrances	Reservation	Available Balance
6100	Salaries	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6150	Professional / Non-Faculty	\$8,170.28	\$8,170.28	\$0.00	\$0.00	\$0.00
6154	Technical / Para-Professional	\$517.98	\$517.98	\$0.00	\$0.00	\$0.00
6181	Overtime	\$71.25	\$71.25	\$0.00	\$0.00	\$0.00
6200	Leave Loaded System	\$443.53	\$443.53	\$0.00	\$0.00	\$0.00
6300	Leave Loaded System Fringes	\$159.66	\$159.66	\$0.00	\$0.00	\$0.00
6500	Employee Benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6510	FICA	\$668.69	\$668.69	\$0.00	\$0.00	\$0.00
6520	TRS	\$260.54	\$260.54	\$0.00	\$0.00	\$0.00
6530	SRA Matching (TIAA-CREF)	\$59.50	\$59.50	\$0.00	\$0.00	\$0.00
6540	Health Insurance	\$83.61	\$83.61	\$0.00	\$0.00	\$0.00
6541	Group Life	\$5.58	\$5.58	\$0.00	\$0.00	\$0.00
6560	Report Total (of all records)	\$13,840.00	\$13,840.00	\$0.00	\$0.00	\$0.00

**The Multi Year Query will display.
You can drill down by clicking on the account codes the same as the
Budget Status by Account Query.
Amounts are from the Contract/Grant ITD, NOT fiscal year.**

Questions?



Contact us!

Website: uah.edu/budget/self-service-help

Ext. 5217 or Ext. 2242