

Budget Office Training

Banner Finance Self-Service Help

Finding Revenues

Basic Budget Queries

The screenshot displays the myUAH website interface. At the top left is the myUAH logo. Below it is a navigation bar with tabs for Home, Student Affairs, and Academics. A breadcrumb trail shows Home Community » Home ».

The main content area is divided into several columns of service categories:

- ANNOUNCEMENTS**: Includes a dropdown menu set to 'All' and a message: "You currently have no announcements." There is a "Show Hidden" checkbox.
- ADMINISTRATION**: Includes links for "Campus Growth & Improvements" and "Exterior Wayfinding".
- COMPLIANCE FORMS**: Includes a "Child Protection Policy Compliance" section with links for "Child Protection Policy", "Child Protection Policy Compliance", and "Child Abuse or Neglect".
- TITLE IX COMPLIANCE**: Includes a link for "2017 Employee Title IX Training".
- EMPLOYEE SERVICES**: Includes "Huron UAH Enrollment Management Plan (Final-Revised 12-5-13)", "Self Service Main Pages" (with a blue arrow pointing to the "Employee" link), "Payroll Self Service" (with links for Timesheets, Pay Stubs, and Leave Balances), "Human Resources" (with links for HR Connection, Truth in Salary Statement, Performance Evaluation, and Personal Review Worksheet), "Faculty & Advisors" (with links for Faculty & Advisor Self Service, Charger 360 Referrals, EAB Student Success Collaborative, Maxient, Student Instructor Evaluations, and Tk20 Log In), and "Research" (with a link for Sponsored Programs Research Reporting).
- ONLINE LEARNING RESOURCES**: Includes links for "Online Learning - Faculty Resources", "Online Programs and Courses", "Online Learning Best Practice Checklist" (with a note to complete a self-evaluation), "Canvas Instructor Tour" (with a note to learn how to create quizzes, assignments, discussions, modules and more), "Online Course Template" (with a note designed to facilitate a modular online course structure), and "Online/Distance Learning Policy".
- STUDENT SERVICES**: Includes a "Registration" section.
- CAMPUS SERVICES**: Includes "UAH Police / Parking Management".
- EMPLOYEE SERVICES** (continued): Includes "Chargerware" (download software) and "Qualtrics" (create and manage surveys).

Banner Finance Self-Service



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Finance

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Budget Status by Account-Revenues



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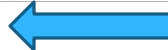
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Budget Queries

To create a new query choose a query type and select Create Query. To retrieve an existing query choose a saved query and select Retrieve Query.

Create a New Query

Type



Retrieve Existing Query

Saved Query



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Budget Query Setup-Revenues



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Budget Queries

Select the Operating Ledger Data columns to display on the report.

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

Save Query as:

Shared

Adopted Budget- Budget at the beginning of the Fiscal Year (October 1)

Accounted Budget- Budget as of 'today'

Year to Date- Actual Charges that have hit the account as of 'today'

Encumbrances- Purchase Orders (PO's)-Type of commitment

Reservations- Requisitions - Type of commitment

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**Accounted Budget - Year to Date - Encumbrances - Reservations
=Available Balance**

Budget Query Setup-Revenues



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Budget Queries

For a Budget Query to be successful, a user with Fund Organization query access must enter a value in either the Organization or Grant fields as well as the Fiscal Year, Period, and Chart of Accounts fields. If Grant information is queried, all retrieved information is Grant Inception to Date. Otherwise, all information retrieved is through the Fiscal Year to Date.

To perform a comparison query select a Comparison Fiscal Year and Period in addition to the required Fiscal Year and Period. With this selection, all details retrieved will be placed next to the corresponding comparison fiscal period.

Fiscal year:	2021	Fiscal period:	14
Comparison Fiscal year:	None	Comparison Fiscal period:	None
Commitment Type:	All		
Chart of Accounts	H	Index	
Fund		Activity	
Organization		Location	
Grant		Fund Type	
Account		Account Type	
Program			
<input type="checkbox"/> Include Revenue Accounts			
Save Query as:	<input type="text"/>		
<input type="checkbox"/> Shared			
<input type="button" value="Submit Query"/>			

For the most current information
Fiscal Year- **2021**
Fiscal Period- **14**
Chart of Accounts- **H**
Step 1- **Enter 6-digit Org/Index into**
'Index' box
Step 2- **Click 'Submit Query'**

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Budget Query Setup-Revenues



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Budget Queries

Fiscal year:	2021	Fiscal period:	14
Comparison Fiscal year:	None	Comparison Fiscal period:	None
Commitment Type:	All		
Chart of Accounts	H	Index	
Fund		Activity	
Organization		Location	
Grant		Fund Type	
Account		Account Type	
Program	20		
<input checked="" type="checkbox"/> Include Revenue Accounts			
Save Query as:	<input type="text"/>		
<input type="checkbox"/> Shared			
<input type="button" value="Submit Query"/>			

Fund and Org Sections will auto-populate as will Program code
****Make sure that 'Include Revenue Accounts' box is checked**
****Click 'Submit Query' again to view the Query**

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Reading the Budget Query by Account with Revenues

Report Parameters

Organization Budget Status Report

By Account

Period Ending Sep 30, 2021

As of Dec 15, 2020

View Pending Documents

✓ No pending documents exist

Chart of Accounts	H The University of AL in Huntsville	Commitment Type	All
Fund		Program	20 Research
Organization		Activity	All
Account	All	Location	All

CHECK YOUR TITLE, FUND, ORG AND DATES!!

Query Results

Account	Account Title	FY21/PD14 Adopted Budget	FY21/PD14 Accounted Budget	FY21/PD14 Year to Date	FY21/PD14 Encumbrances	FY21/PD14 Reservations	FY21/PD14 Available Balance
5811	C & G Clearing	0.00	271.94	332.31	0.00	0.00	(60.37)
7000	Expenditures	0.00	4,094.43	0.00	0.00	0.00	4,094.43
7172	Internet/Web Services	0.00	(1,950.00)	0.00	0.00	0.00	(1,950.00)
Report Total (of all records)		0.00	(1,800.00)	1	0.00	0.00	

Download All Ledger Columns | Download Selected Ledger Columns | View Payroll Expense Detail

Save Query as:

Shared

5000-Revenues

Note 1: Revenue codes
Account codes with '5xxx' are Revenue account codes. This line will appear only if Include Revenue Accounts Box is checked on the previous screen.

Note 2: Accounted Budget, Year-to-Date, Available Balance

- The Accounted Budget is already available to be spent.
- The Year-to-Date has accrued within the Fiscal Year
- The negative Available Balance amount is the result of the Accounted Budget minus the YTD in revenue line 5811.

In this example, there is \$60.37 available that can be moved to the expenditure line

Note 3:
If the Include Revenue Accounts box is checked, you will not see an amount in Available Balance for the Report Total. The Revenue amounts are not 'Available' for use until they are added to the Expenditures budget. Therefore, no total can be calculated.

Revenue Requests

Requests to move revenue should be emailed to:

Tammy Haymon at tgh0008@uah.edu

The email request should include the following

- * Organization Code
 - * Fund Code
- * Estimated amount

Please note, the Budget Office may request additional information from you related to the revenue source before processing your request.

Questions?



Contact us!

Tammy Haymon: tgh0008@uah.edu; Ext 2242

Mark Massey: mdm0023@uah.edu ; Ext 5217

Alicia Callis: hoscha@uah.edu ; Ext 5604

Chih Loo: looc@uah.edu ; Ext 2243