

Banner Self-Service — Budget Query by Organizational Hierarchy (Operating Budgets)

Do a budget query by organization hierarchy in Banner Self-Service if you want an overview of operating expenditures for an entire organization hierarchy.

1. Open your web browser, and enter
https://syserp11.eiu.edu:9093/pls/PROD/twbkwbis.P_WWWLogin
2. Enter your Username and Password in proper fields.
3. Press Enter or click on Login button.
4. Click on the “Finance” tab.
5. Click on “Budget Queries.”
6. Click on the first down arrow and choose “Budget Status by Organizational Hierarchy.”
7. Click on the “Create Query” button.
8. Make sure the following boxes are checked on the Budget Query screen:
 - Adopted Budget
 - Adjusted Budget
 - Year to Date
 - Commitments
 - Available Balance
9. Click on the “Continue” button.
10. Click on the down arrows to choose the desired parameters for the following fields:
 - Fiscal year: 2009
 - Fiscal period: Choose 01 for July, 02 for August, and so forth.
 - Comparison Fiscal year: None
 - Comparison Fiscal period: None
 - Commitment Type: All
 - Chart of Accounts: E
 - Organization: Enter the first 1, 2, 3 or 4 digits of the hierarchy you wish to query (e.g., 123 for the College of Sciences).
 - Account: Enter 7% (because all operating accounts begin with 7).

If your query is for appropriated (ledger 1) organizations, make sure the “Include Revenue Accounts” box is **unchecked**.
11. Click on “Submit Query” button.
12. At this screen, you can click on any of the sublevels under the “Organization” column to drill down further in the hierarchy.
13. Make sure to click on **EXIT** at the upper right-hand side when you are done with Banner Self-Service.