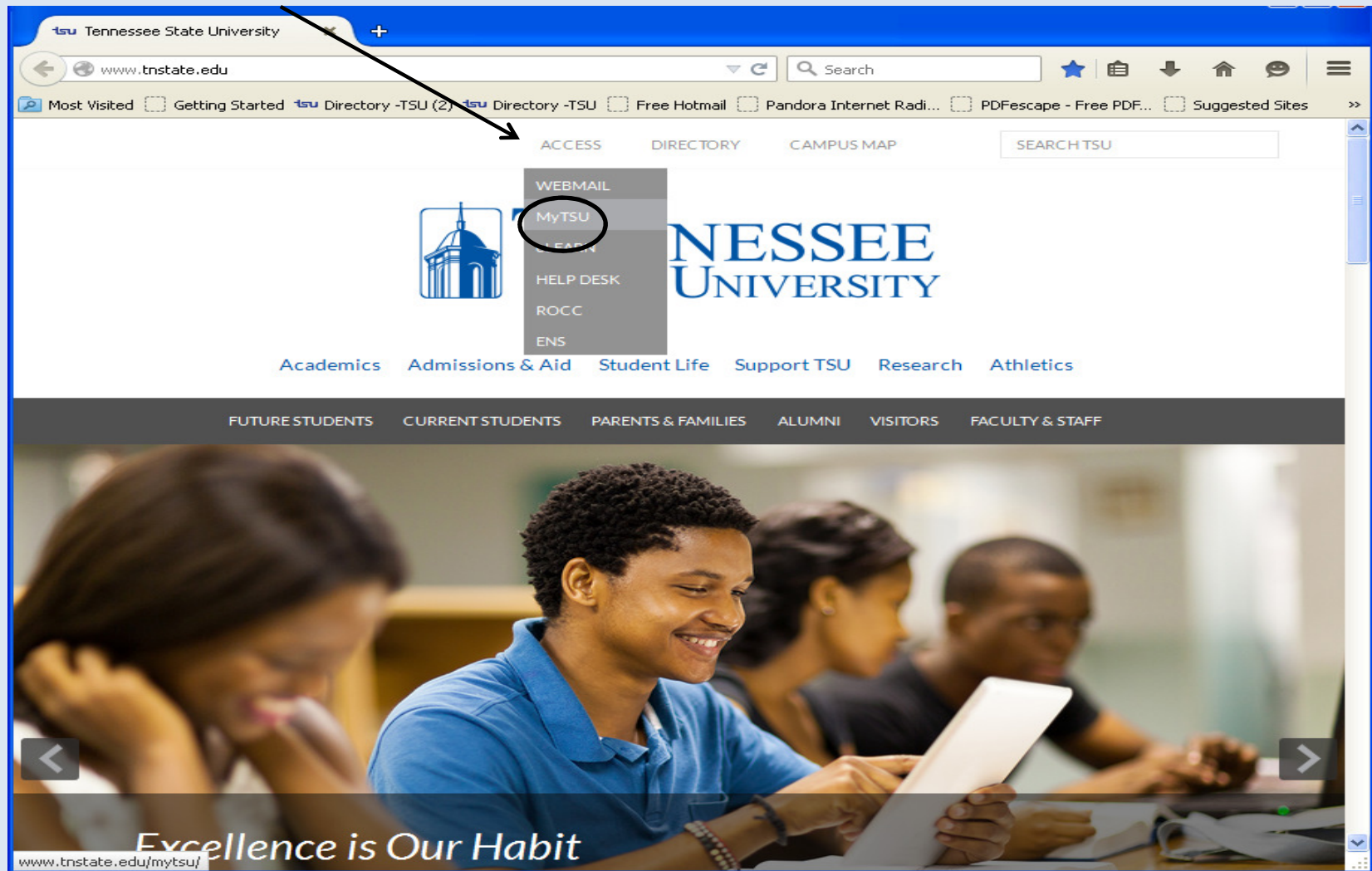


TENNESSEE
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BUDGET OFFICE

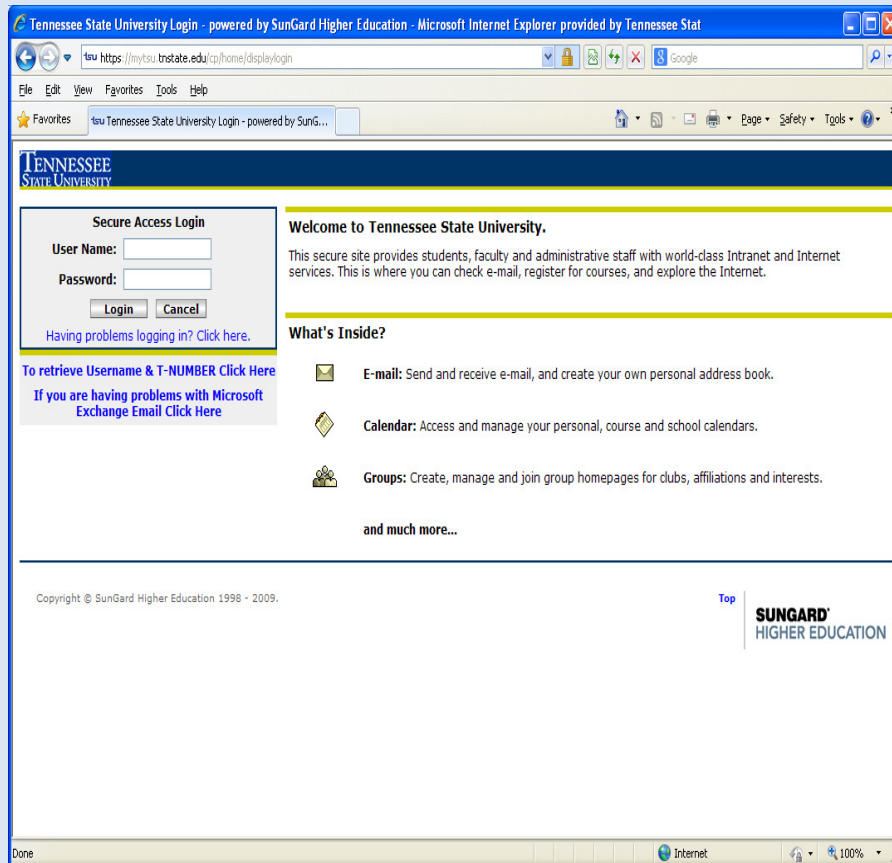
USING SELF SERVICE BANNER FINANCE

Getting to Self Service Banner

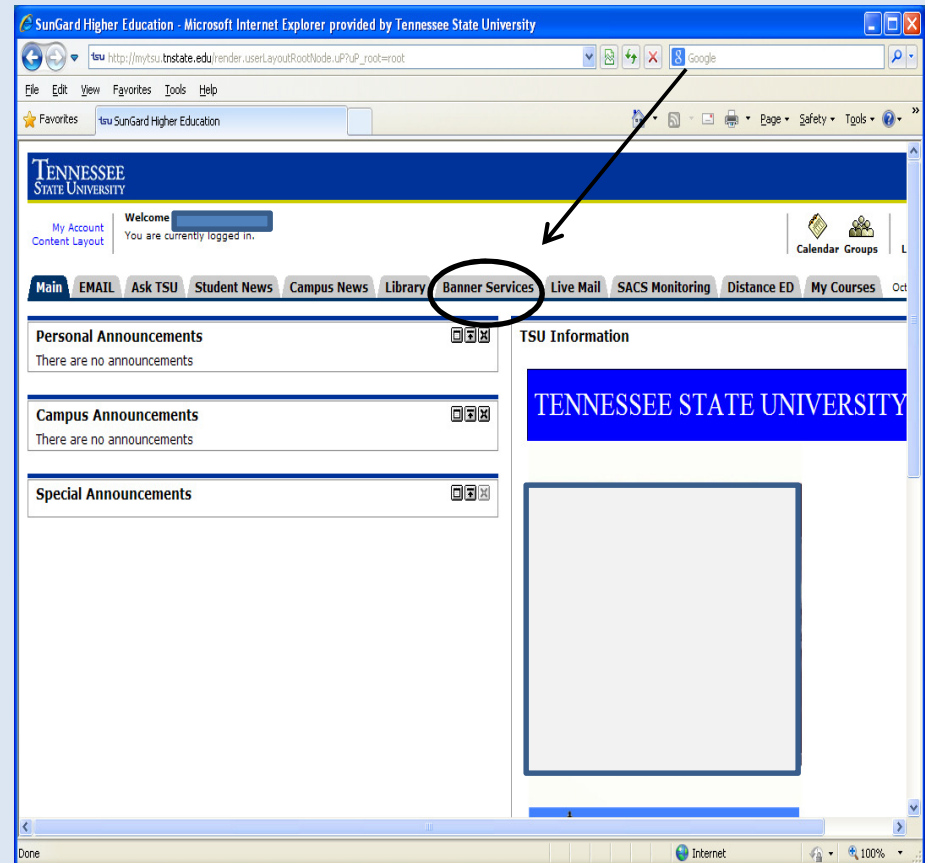


From TSU's homepage, click on *Access*, then **MyTSU**

Getting to Self Service Banner



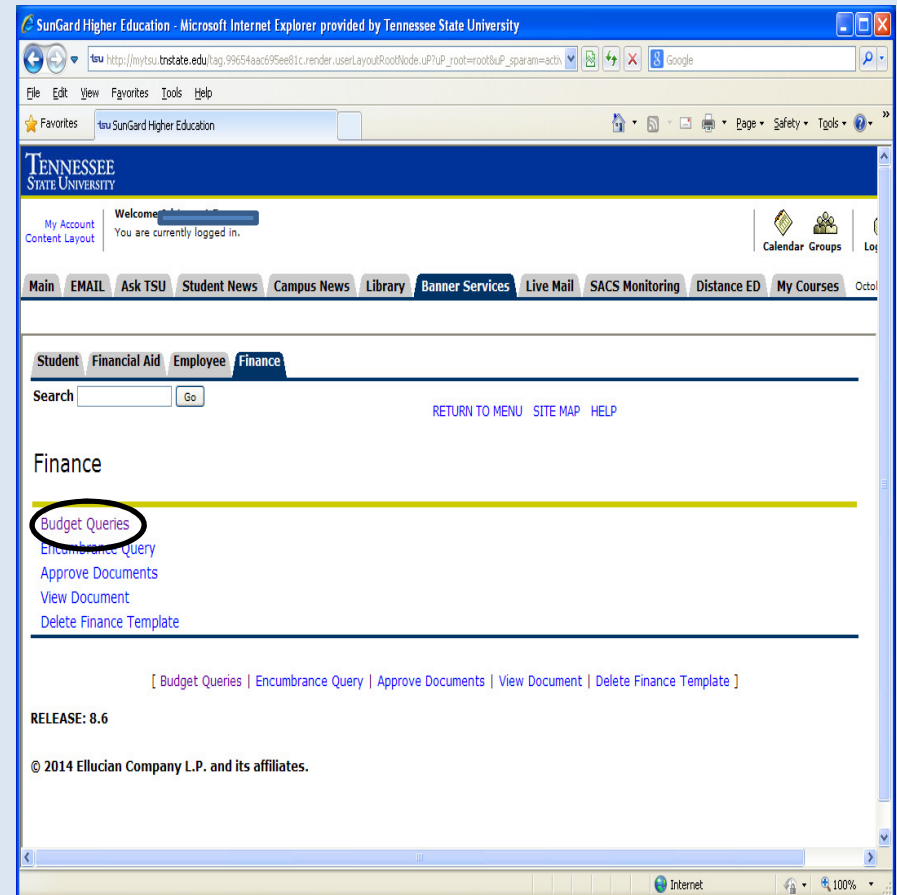
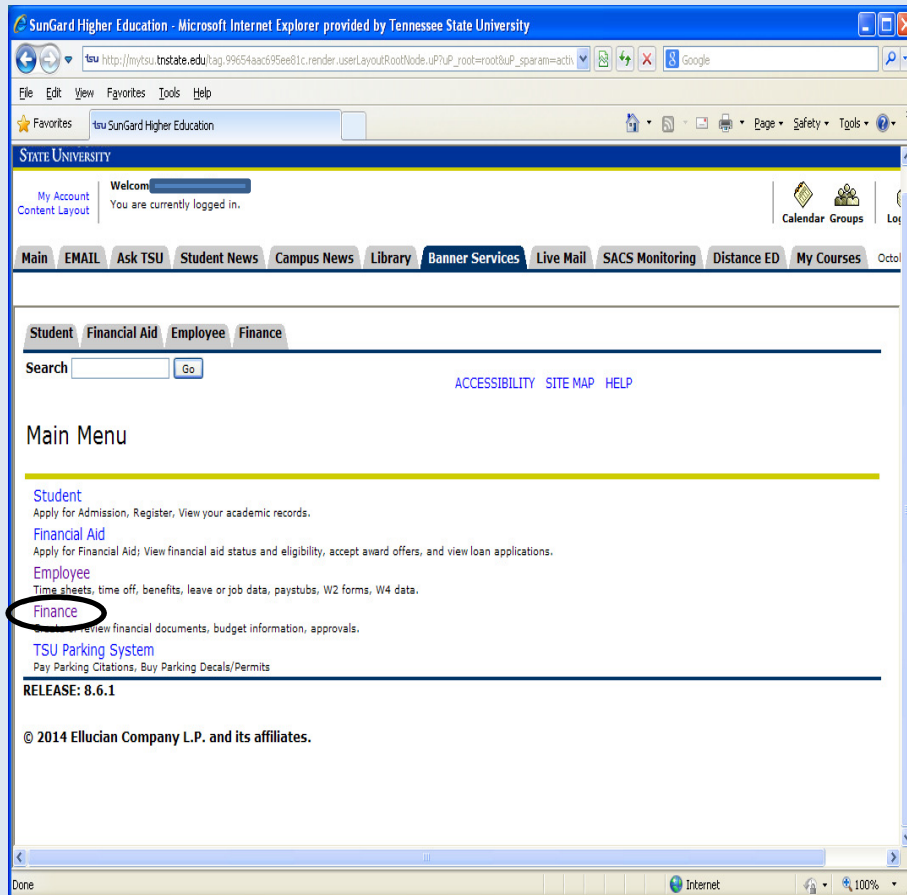
- After clicking MyTSU, this will be the next screen
- Login here with assigned User Name and Password



- After logging in, select the **Banner Services** tab

Using Self Service Banner Finance

Select the **Finance** option from the Main Menu



Then, select **Budget Queries** from the Finance Menu

Using Self Service Banner Finance

The next menu is **Budget Queries**

- Click the drop-down box
- Select **Budget Status by Account**
- Click **Create Query**

Screenshot of the SunGard Higher Education Self Service Banner Finance interface. The page shows the 'Budget Queries' section with a 'Create a New Query' form. A dropdown menu is open for 'Type', showing options: 'Budget Status by Account', 'Budget Status by Account', 'Budget Status by Organizational Hierarchy', and 'Budget Quick Query'. An arrow points to the first 'Budget Status by Account' option. Below the dropdown is a 'Retrieve Existing Query' section with a 'Saved Query' dropdown set to 'None' and a 'Retrieve Query' button. The page also includes a search bar, navigation tabs (Main, EMAIL, Ask TSU, Student News, Campus News, Library, Banner Services, Live Mail, SACS Monitoring, Distance ED, My Courses), and a footer with links like 'Budget Queries', 'Encumbrance Query', 'Approve Documents', 'View Document', and 'Delete Finance Template'.

Using Self Service Banner Finance

- Selecting the correct columns to display is very important to understanding the given information.

For best results, it's highly recommended that the following boxes be checked:

- Adopted Budget
- Budget Adjustment
- Adjusted Budget
- Year to Date
- Encumbrances
- Available Balance

The screenshot shows a web browser window displaying the Tennessee State University Banner Finance Self Service interface. The browser's address bar shows the URL: `http://mytsu.tnstate.edu/tag.cfm?d5d9b14ba35c.render.userLayoutRootNode.uP?uP_root=rc`. The page features a navigation bar with links: [Main](#), [EMAIL](#), [Ask TSU](#), [Student News](#), [Campus News](#), [Library](#), [Banner Services](#) (highlighted), [Live Mail](#), [SACS Monitoring](#), and [Distance ED](#). Below the navigation bar, there is a section for "Personal Information" with tabs for "Student", "Financial Aid", "Employee", and "Finance" (selected). A search bar is present with a "Go" button and links for "MENU", "SITE MAP", and "HELP". The "Budget Queries" section prompts the user to "Select the Operating Ledger Data columns to display on the report." and provides a table of checkboxes for selection:

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

Below the table, there is a "Save Query as:" field, a "Shared" checkbox, and a "Continue" button. At the bottom of the page, there are links: [\[Budget Queries | Encumbrance Query | Approve Documents | View Document | Delete Finance Template \]](#). The browser's status bar at the bottom indicates "Internet" and "100%" zoom.

Using Self Service Banner

- For the most up-to-date information, *Fiscal Period* should always be **14**
- When retrieving *Available Balance*, it is best for the Commitment Type to be **Uncommitted**
- Enter FOAP (Fund, Org, Account, Program)
- **Submit Query**
- **Tips**
 - All transaction history for an account can be viewed by using a % sign behind the first two numbers of the account
 - The **Include Revenue Accounts** box should **not** be checked

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: 2015 Fiscal period: 14
Comparison Fiscal year: None Comparison Fiscal period: None
Commitment Type: Uncommitted

Chart of Accounts: S Index
Fund: 110001 Activity
Organization: 12345 Location
Grant: Fund Type
Account: 73% Account Type
Program: 200

☐ Include Revenue Accounts
Save Query as:
☐ Shared
Submit Query

Do **NOT** Check this box

Example: To see all transaction history in Travel account, enter 73%

Sungard Higher Education - Microsoft Internet Explorer, provided by Tennessee State University

tsu http://mytsu.tnstate.edu/tag.cfcd55d9b14ba35c.render.userLayoutRootNode.uP?uP_root=rc

File Edit View Favorites Tools Help

★ Favorites | tsu Directory - TSU (2) PDFescape - Free PDF Edito... Pandora Internet Radio - Lis... TSU Job Listings Walmart tsu Directory - TSU

TSU Job Listings | tsu Sungard Higher Education

TENNESSEE STATE UNIVERSITY

My Account Content Layout | Welcome Adrienne L Frame You are currently logged in. | Calendar

Main EMAIL Ask TSU Student News Campus News Library Banner Services Live Mail SACS Monitoring Distance ED My

Chart of Accounts	S Tennessee State University	Commitment Type	Uncommitted	No pending documents exist
Fund	110001 Undesignated E and G	Program	450 Institutional Support	
Organization		Activity	All	
Account	73%	Location	All	

Query Results

Account	Account Title	FY15/PD14 Adopted Budget	FY15/PD14 Budget Adjustment	FY15/PD14 Adjusted Budget	FY15/PD14 Year to Date	FY15/PD14 Encumbrances	FY15/PD14 Available Balance
73000	Travel Budget Pool	4,770.00	1,000.00	5,770.00	0.00	0.00	5,770.00
73100	Individual Instate Travel	0.00	0.00	0.00	921.62	428.38	(1,350.00)
73200	Individual Out Of State Or Country	0.00	0.00	0.00	2,259.50	1,621.82	(3,881.32)
Report Total (of all records)		4,770.00	1,000.00	5,770.00	3,181.12	2,050.20	538.68

Download All Ledger Columns | Download Selected Ledger Columns

Done | Internet | 100%

If the account has had any activity, the output from the query should appear this way.

- For detailed information on the dollar amounts, click on the highlighted blue figures

Notice the **available balance** in the lower right-hand corner

Available Balance