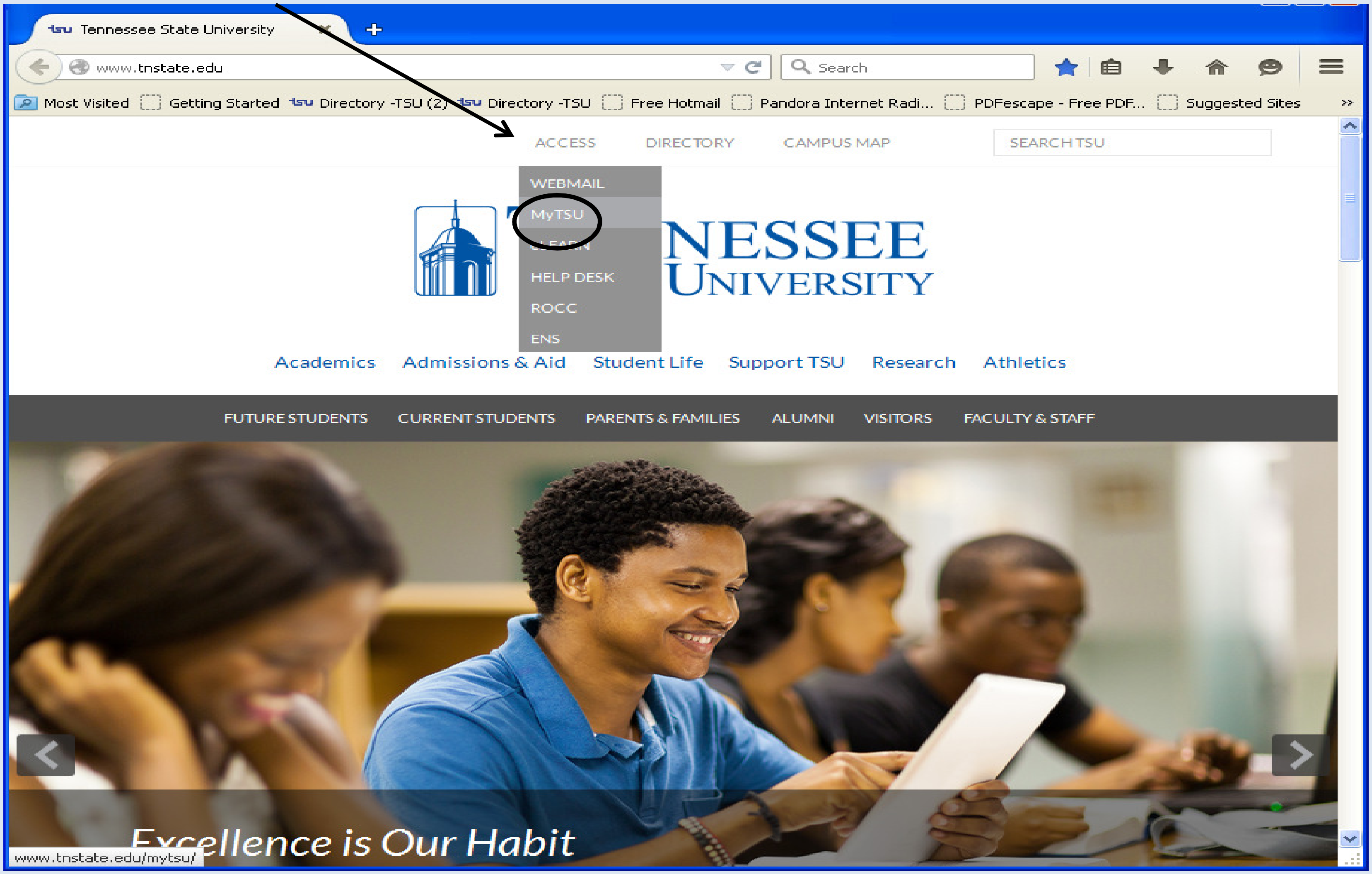
TENNESSEE STATE UNIVERSITY

BUDGET OFFICE

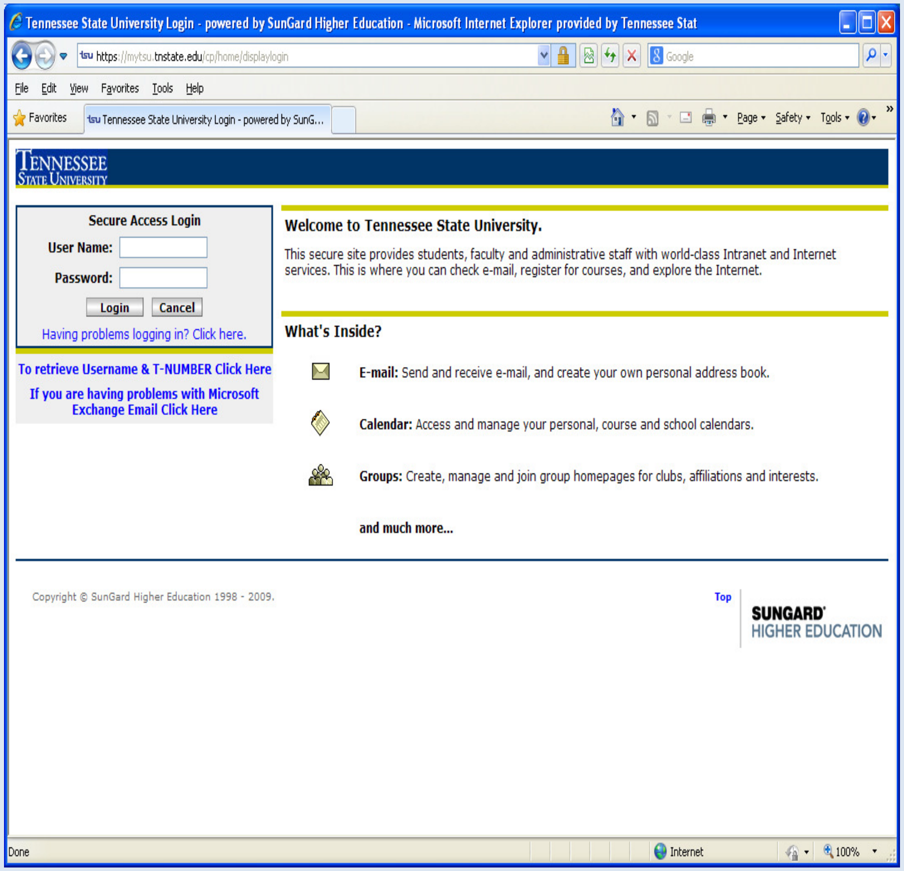
USING SELF SERVICE BANNER FINANCE

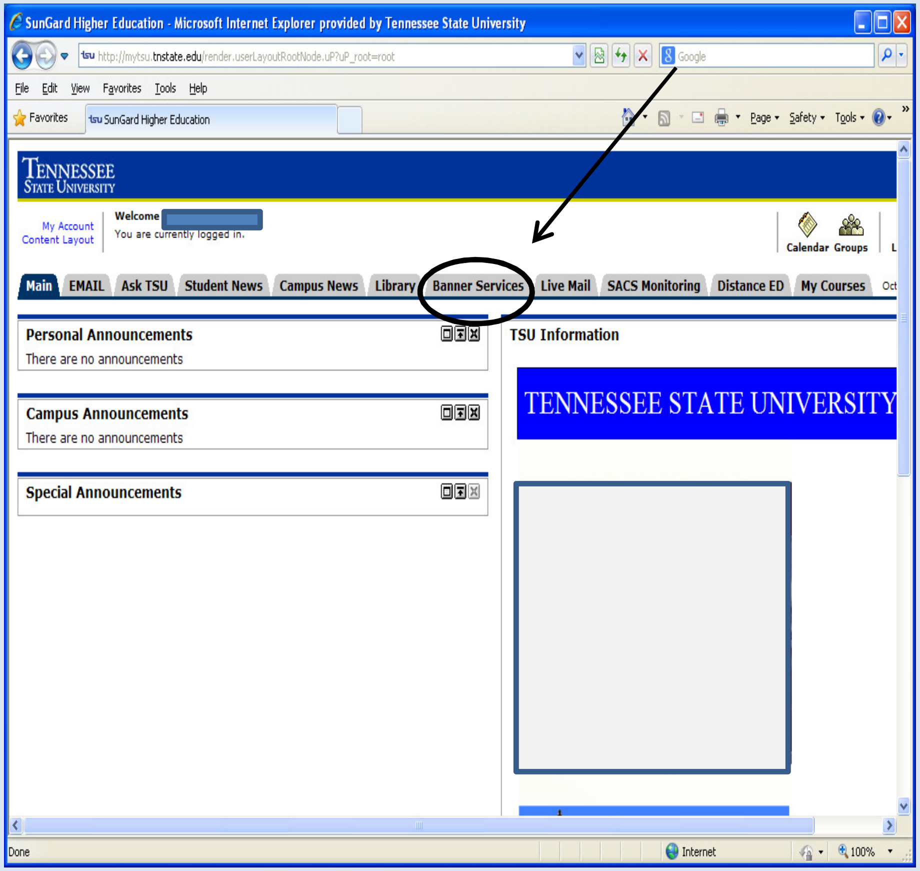
Getting to Self Service Banner



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

Getting to Self Service Banner



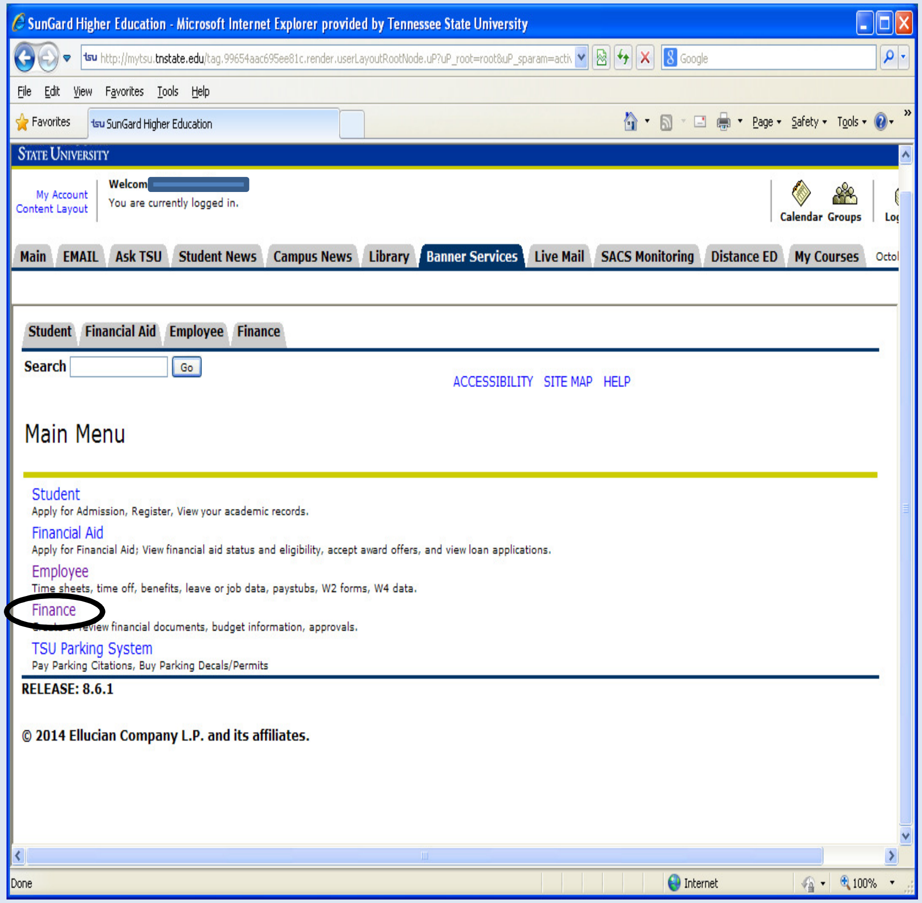


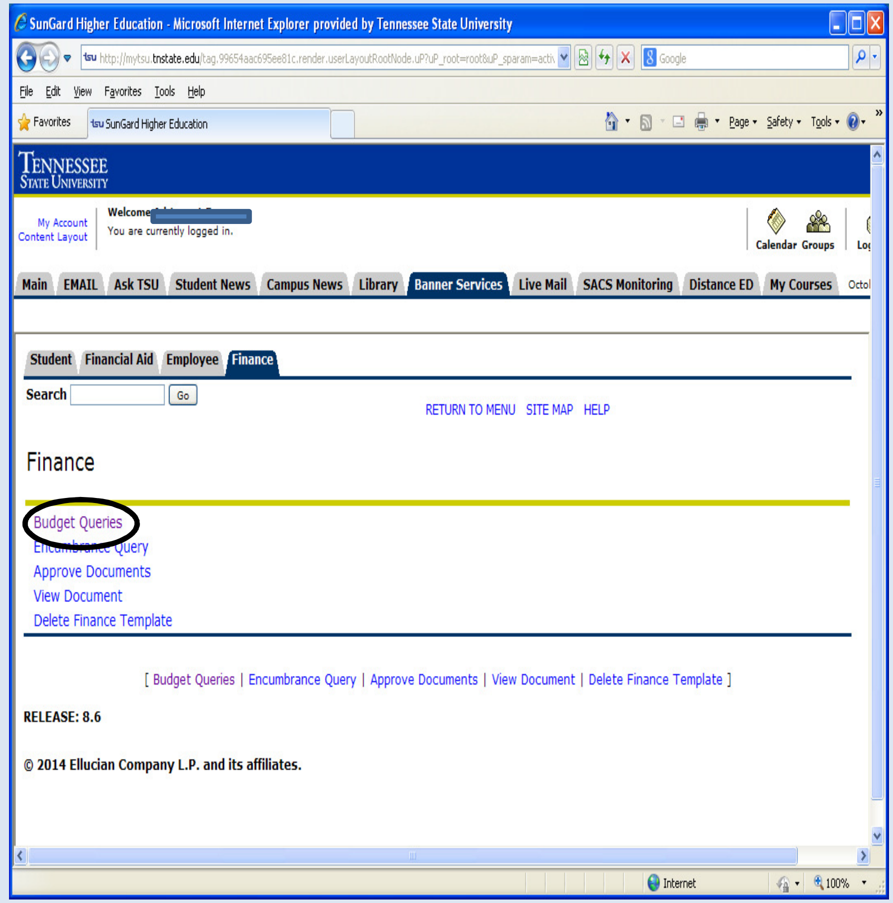
- After clicking MyTSU, this will be the next screen
- Login here with assigned User Name and Password

- 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

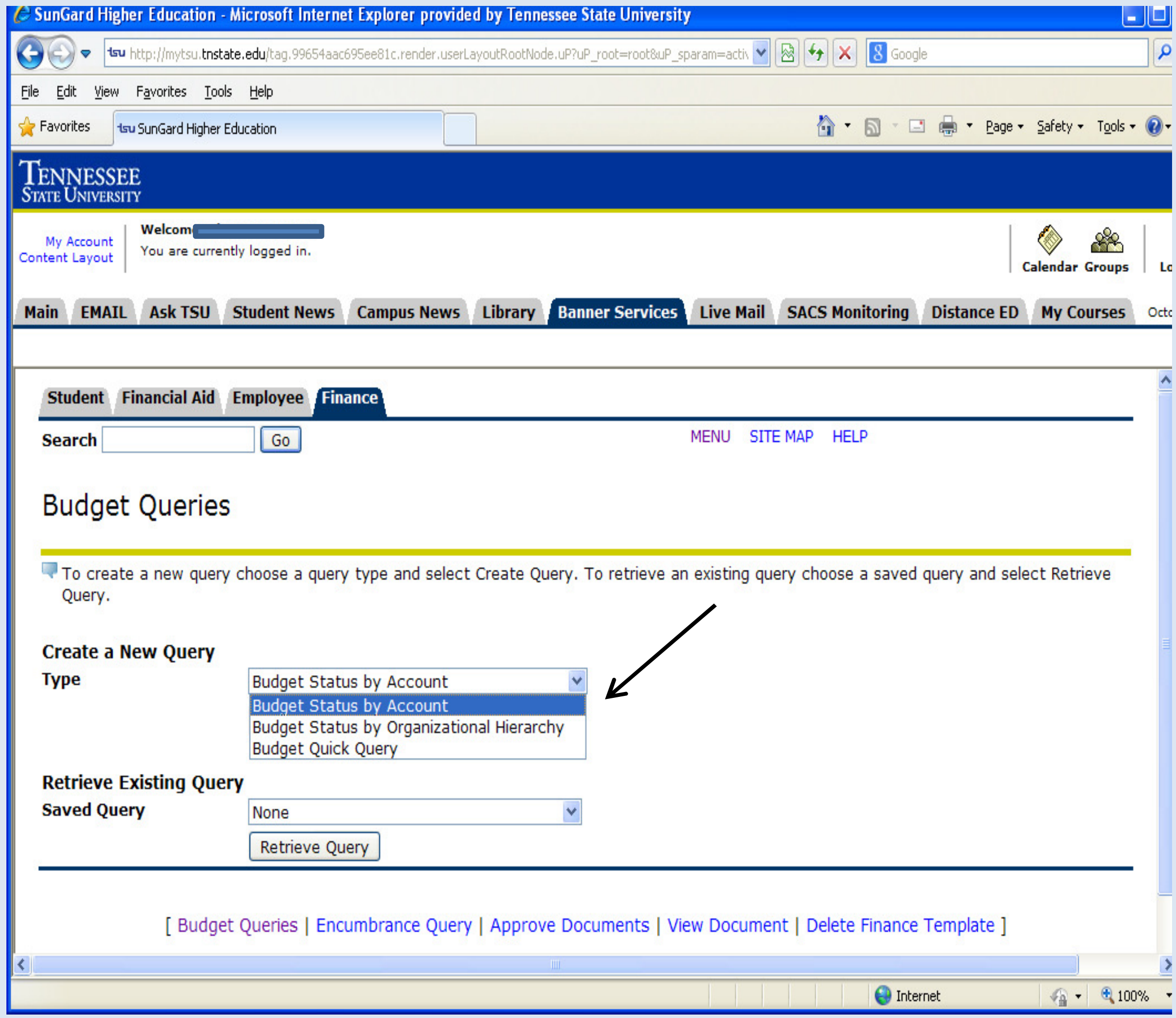
Using Self Service Banner Finance

The next menu is **Budget Queries**

- Click the drop-down box

- Select ***Budget Status by Account***

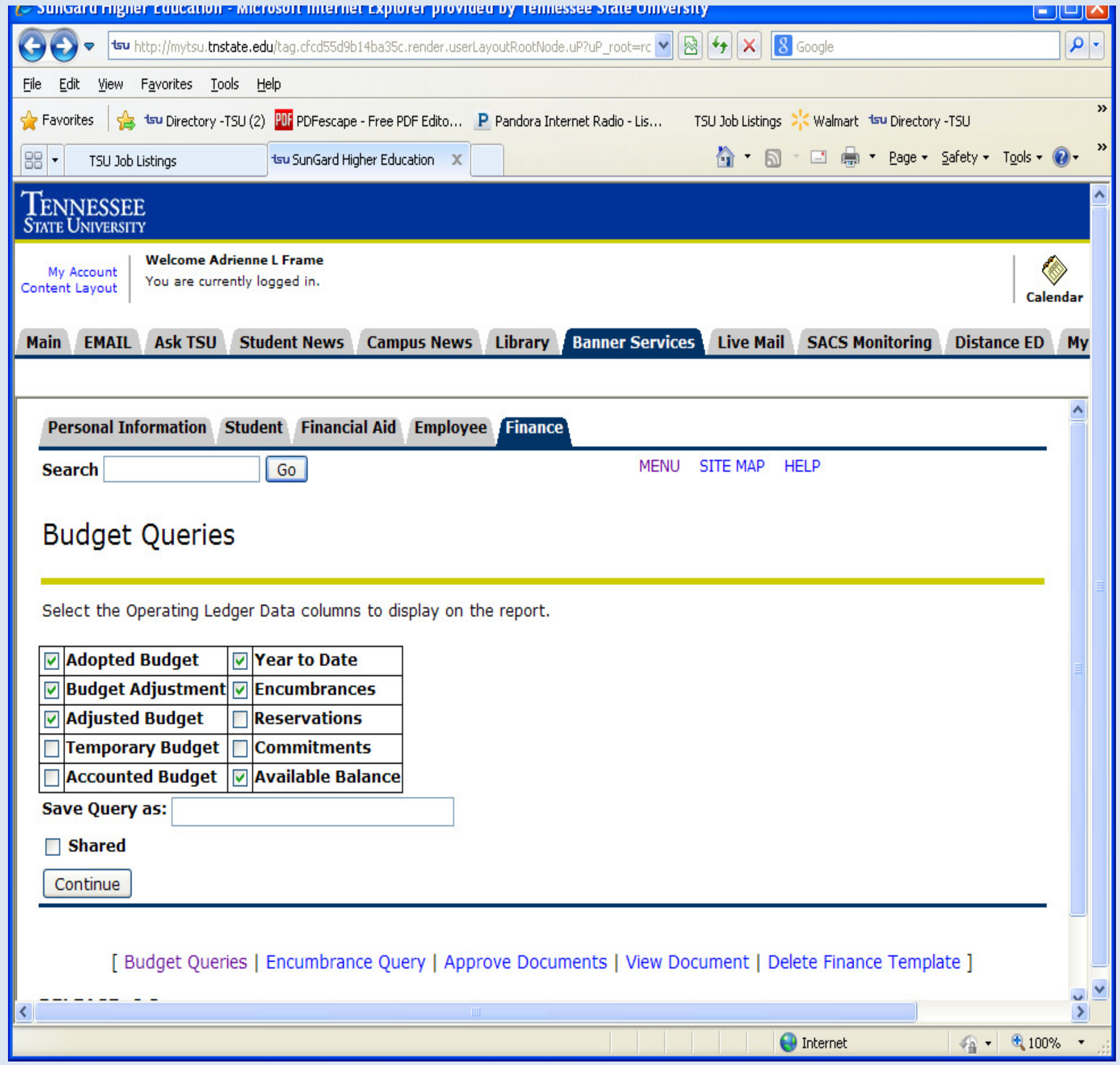
- Click ***Create Query***



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



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***

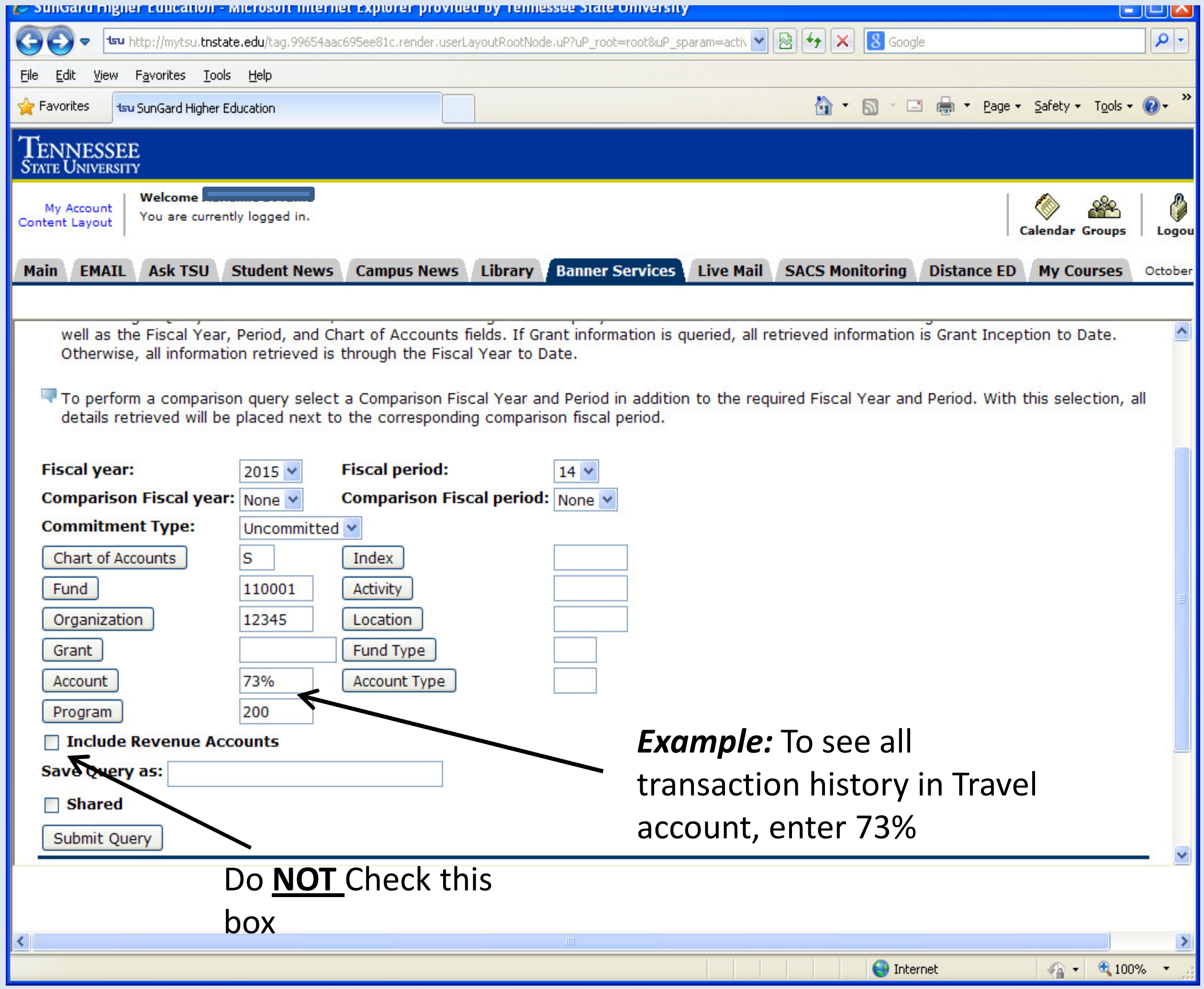
- Enter FOAP (<u>**F**</u>und, <u>**O**</u>rg, <u>**A**</u>ccount, <u>**P**</u>rogram)

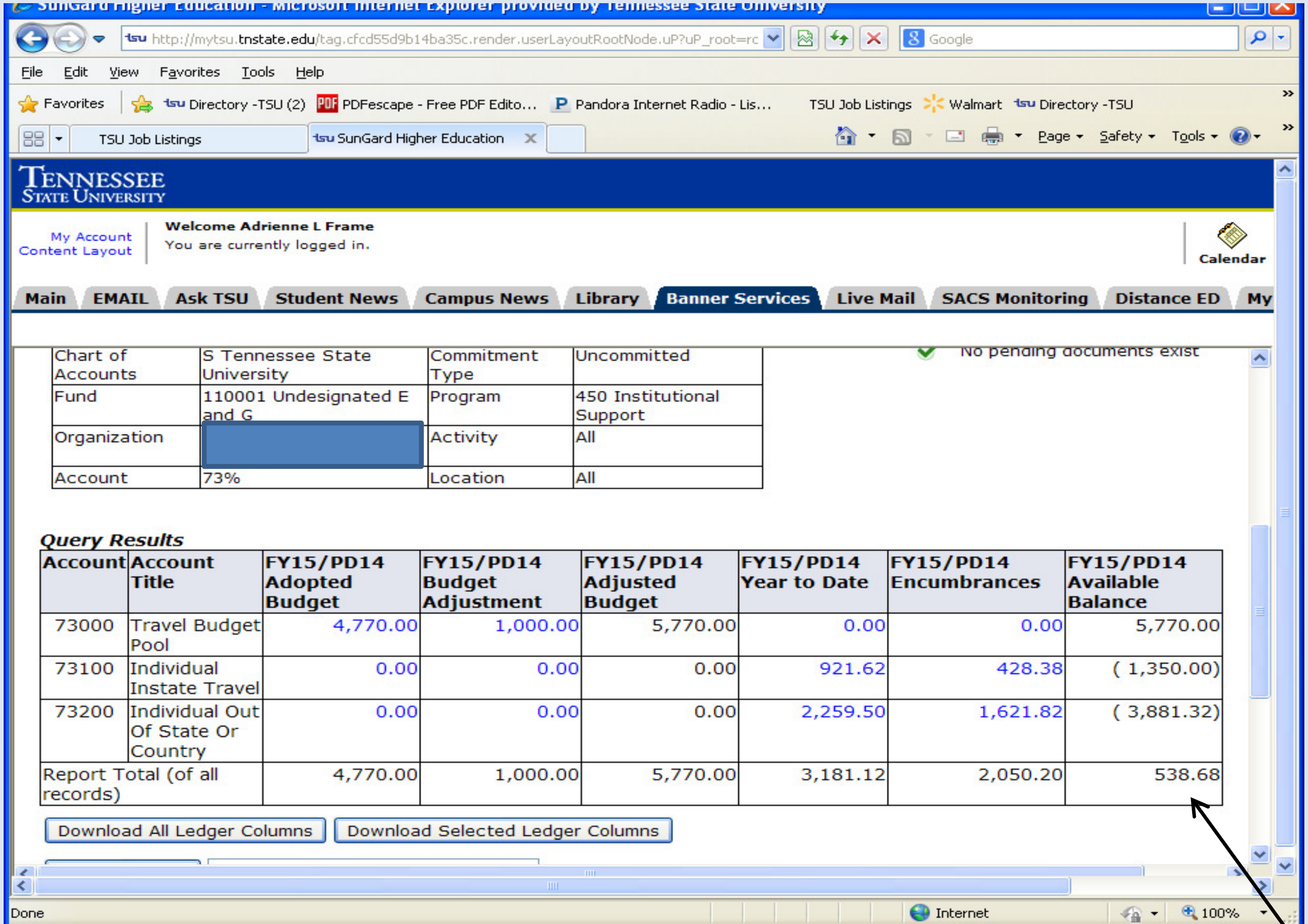
- ***Submit Query***

- ***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 <u>**not**</u> be checked





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Tennessee State University

Welcome Adrienne L Frame
You are currently logged in.

My Account
Content Layout

Calendar

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

No pending documents exist

Chart of Accounts	S Tennessee State University	Commitment Type	Uncommitted
Fund	110001 Undesignated E and G	Program	450 Institutional Support
Organization	[redacted]	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%

Available Balance

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