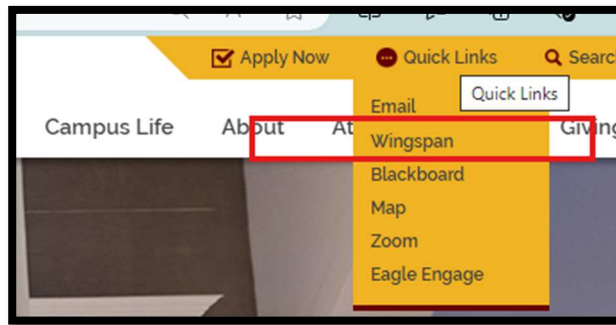
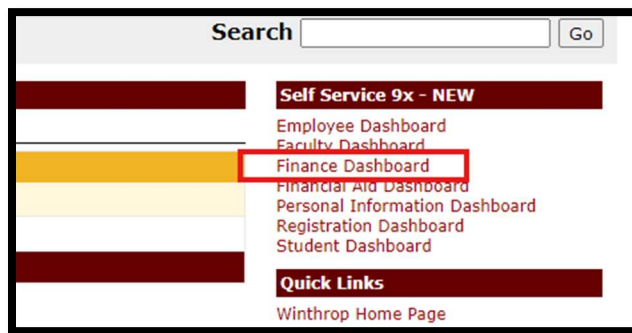


How to Review Budget Activity | Banner Finance Dashboard

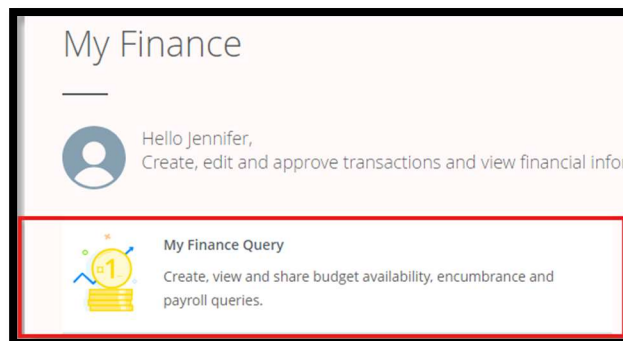
1. From Quick Links, click “Wingspan” (top right corner)



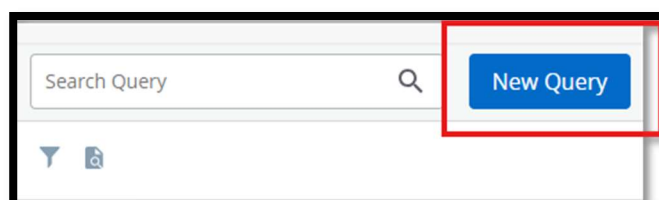
2. From Wingspan, click “Finance Dashboard” (top right corner)



3. From Finance Dashboard, click “My Finance Query” (top right corner)



4. From My Finance Query, click “New Query” (top right corner)



5. From New Query, complete the “Organization” field by typing in your 4-number Org Code or do a key word search for your Organization

The screenshot shows a form titled "Select Query Type" with a dropdown menu set to "Budget Status by Account". Below this, there are sections for "Values", "Chart", "Index", "Fund", and "Organization". The "Organization" dropdown is highlighted with a red box and contains the text "6090 Controllers Office". Other fields include "W Winthrop University" for Chart, "Choose Index" for Index, and "111020 Current Unrestricted E and G" for Fund.

6. From New Query (continued), enter “71” in “Account Type” to exclude payroll lines

The screenshot shows a form with fields for "Fund Type", "Account Type", "Commitment Type", and a checkbox for "Include Revenue Accounts". The "Account Type" dropdown is highlighted with a red box and contains the text "71 Service and Supplies". Other fields include "Choose Fund Type" for Fund Type and "All" for Commitment Type.

7. From New Query (continued), complete the “Fiscal Year” and “Fiscal Period” fields by inputting the latest year available and inputting “14” in the “Fiscal Period” field

The screenshot shows a form with fields for "Fiscal Year", "Fiscal Period", "Comparison Fiscal Year", and "Comparison Fiscal Period". The "Fiscal Year" and "Fiscal Period" dropdowns are highlighted with a red box and contain the values "2025" and "14" respectively. Other fields include "None" for both Comparison Fiscal Year and Comparison Fiscal Period.

8. From New Query (continued), select “Adjusted Budget”, “Year to Date”, “Encumbrance”, and “Available Balance”

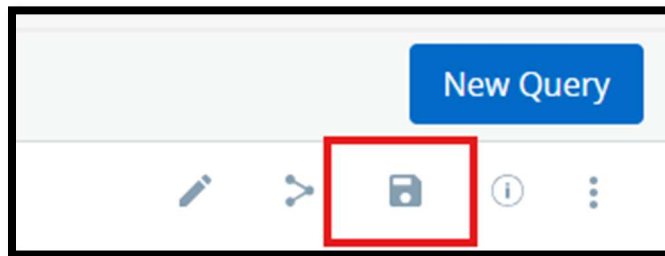
The screenshot shows a form titled "Operating Ledger" with several checkboxes. The checkboxes for "Adjusted Budget", "Year to Date", "Encumbrance", and "Available Balance" are highlighted with red boxes. Other checkboxes include "Adopted Budget", "Budget Adjustment", "Temporary Budget", "Accounted Budget", "Reservation", and "Commitments".

9. Click “Submit”

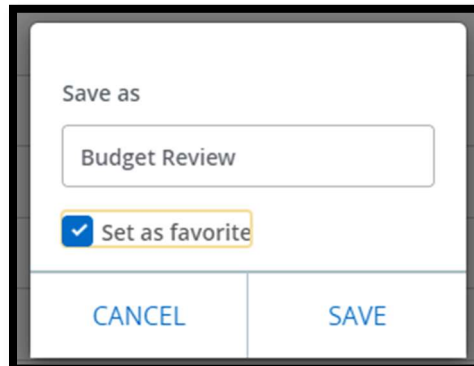
Definitions:

- **Adjusted Budget** – Current budget
 - **Year to Date** – Actual revenue or expense activity year-to-date
 - **Encumbrance** – Budgeted funds committed for future expenditures, through a salary encumbrance, purchase order, etc.
 - **Available Balance** – Remaining available budget
-

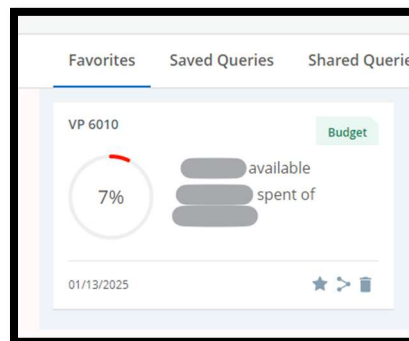
10. Click the “Save” icon



11. Add any Title and click “Set as favorite” and click “Save”



12. The next time you go to “My Finance Query”, you’ll see a summary of your budget and be able to click the box for more details



13. If you manage multiple Orgs, after Step 4, click “Budget Status by Organizational Hierarchy” and restart at Step 5.

The image shows a screenshot of a software interface titled "Create New Query". Below the title is a horizontal line. Underneath, the text "Select Query Type" is followed by a dropdown menu. The dropdown menu is currently open, showing a list of query types. The first item is "Budget Status by Account" with an upward-pointing arrow. Below it is a search input field with a magnifying glass icon. The second item is "Budget Status by Organizational Hierarchy", which is highlighted with a blue background and a red rectangular border. Below this are "Budget Quick Query", "Multi Year Query", and "Encumbrance Query". To the right of the dropdown menu, the words "Index" and "Choose" are partially visible. At the bottom of the dialog, the words "Fund" and "Organize" are partially visible.