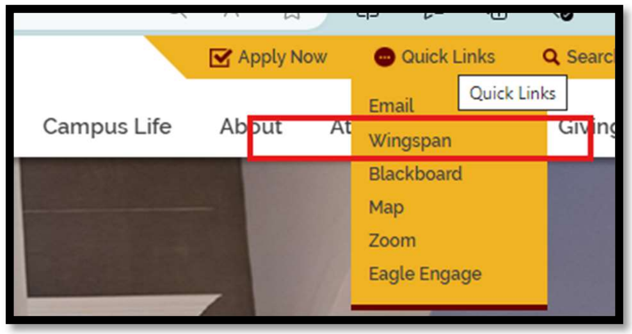
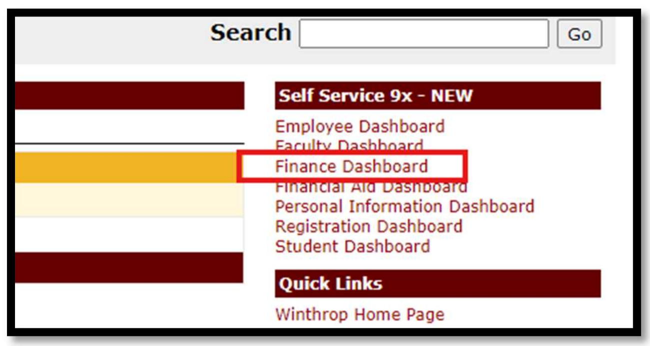
How to Review Budget Activity | Banner Finance Dashboard

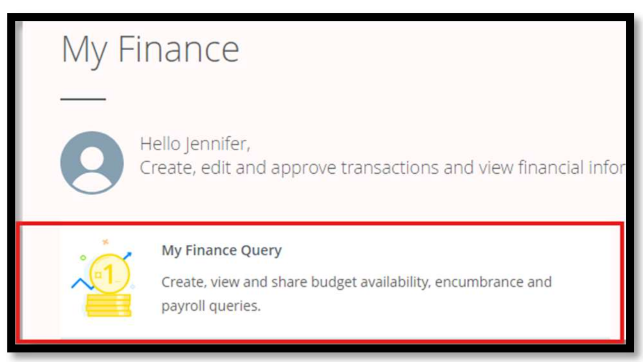
1. From Quick Links, click “Wingspan” (top right corner)



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

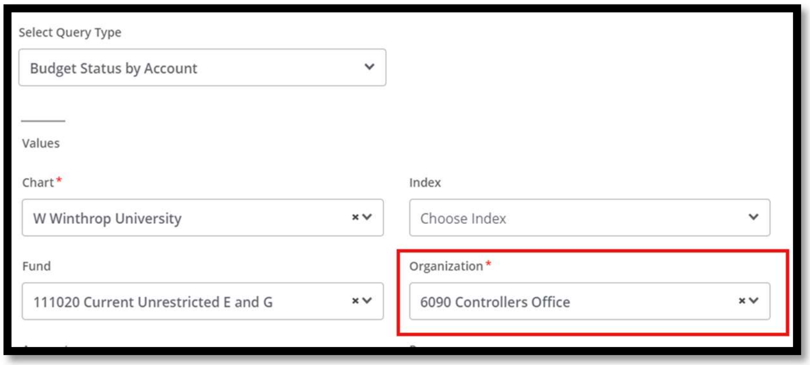


3. From Finance Dashboard, click “My Finance Query” (top right corner)

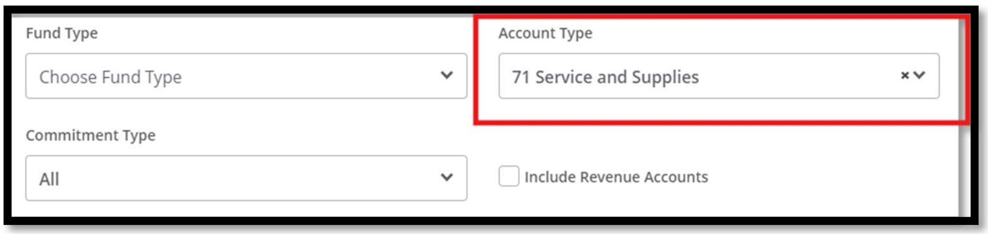


4. From My Finance Query, click “New Query” (top right corner)

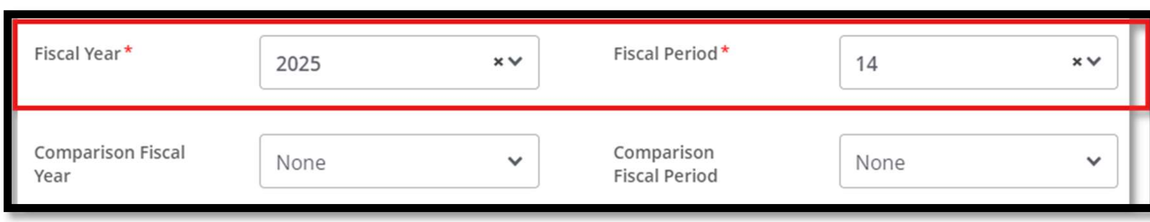
5. From New Query, complete the “Organization” field by typing in your 4-number Org Code or do a key word search for your Organization



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



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



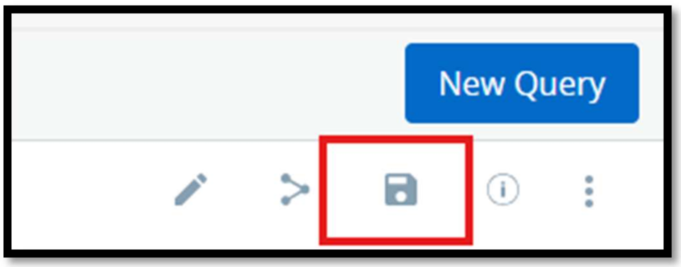
8. From New Query (continued), select “Adjusted Budget”, “Year to Date”, “Encumbrance”, and “Available Balance”

9. Click “Submit”

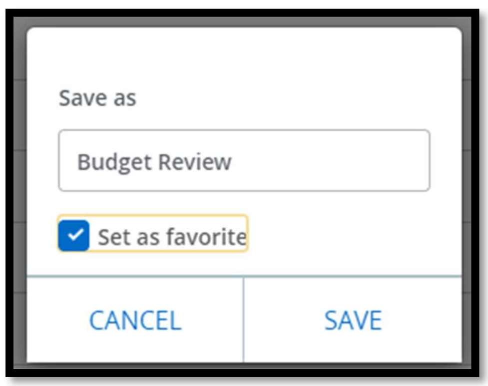
Definitions:

- **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

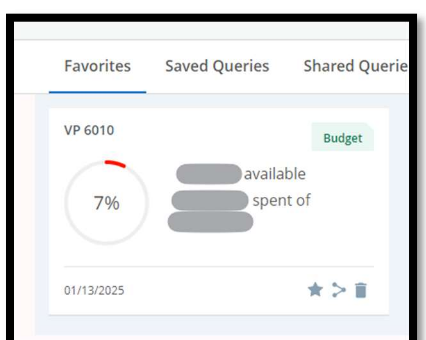
10. Click the “Save” icon



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.