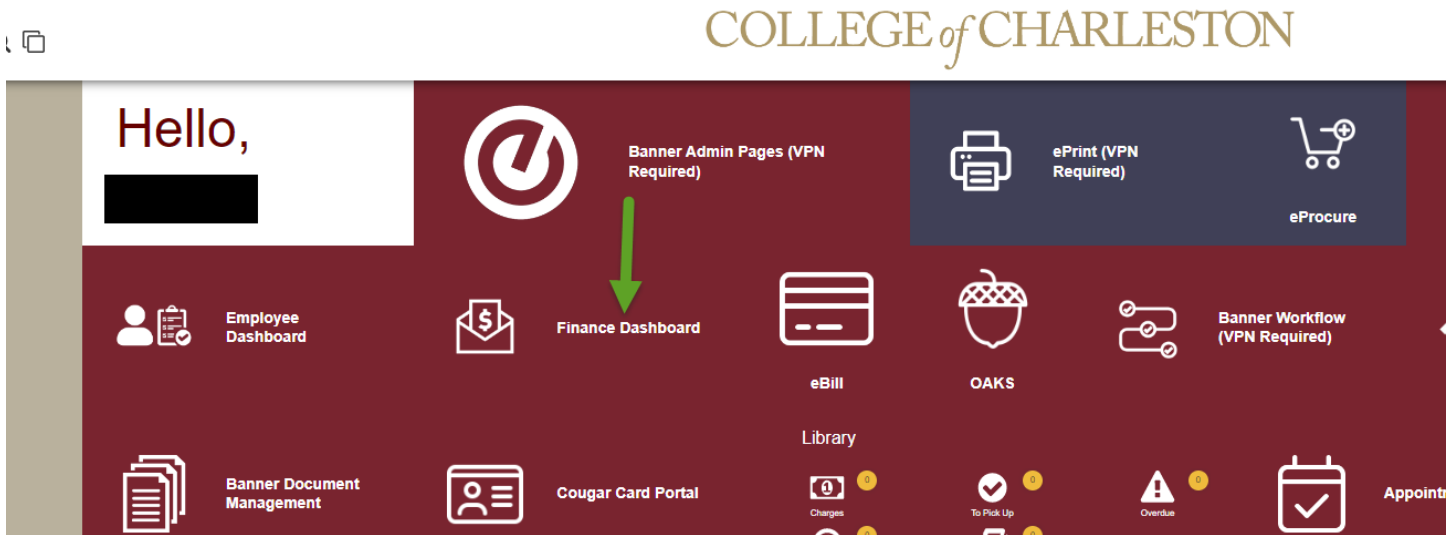


How to Access Banner Self-Service

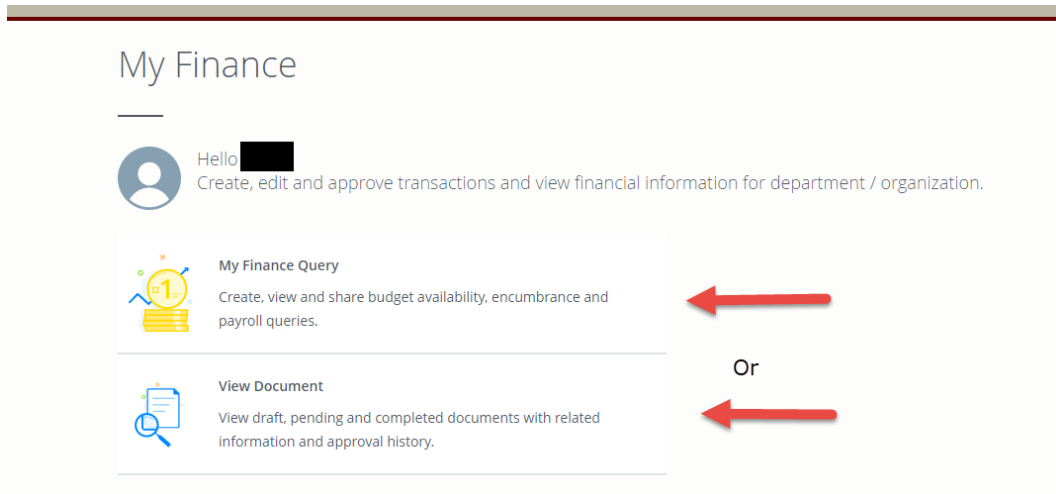
For access to Banner Self Service, complete the Self-Service Banner (SSB) Authorization Request form on the Controller’s website: <https://controller.cofc.edu/documents/accounting-forms/banner-ssb-security.pdf>

To obtain access to an Index, update the users via the Index/FOP Access form on the Controller’s website: <https://controller.cofc.edu/documents/accounting-forms/index-fop-access-form.pdf>

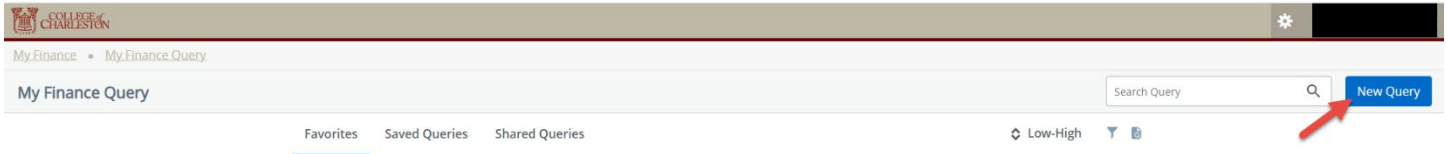
1. Sign into MyPortal.
2. Identify and click on the “Finance Dashboard” Title. Note: the tile may be a different location on “your” MyPortal.



3. Click on “My Finance Query” to view budget, activity, and expense finance data. Click on “View Document” to view document information with a particular document number (Invoice, Journal Entry, Purchase Order, etc.).



4. To view finance information, after choosing “My Finance Query, click “New Query” on the top right-hand side of the screen.



5. Type of query – Choose one
 - a. Budget Status by Account – Displays finance information by account code (i.e. revenue/expense description) for one Index.
 - b. Budget Status by Organizational Hierarchy – Displays finance information totals for either one Index **OR** an Executive Level/Division with multiple Indexes included in the total. End-users can drill-down via blue hyperlinks for detailed data.
 - c. Encumbrance Query – Displays encumbrance information for Index.
6. Enter Index number **OR** Organizational Level (EXECXX or DIVXXX).

Create New Query

Select Query Type

Budget Quick Query

Budget Status by Account

Budget Status by Organizational Hierarchy

Encumbrance Query

Multi Year Query

Budget Quick Query

Choose One

Fund

Choose Fund

Account

Choose Account

Activity

Index

Choose Index

Organization *

Choose Organization

Program

Choose Program

Location

Enter Index under Index OR EXECXX/DIVXXX under Organization

7. Use scroll bar on the right-hand side of the create new query box to scroll down.
 - a. Include Revenue Accounts
 - i. **Index that begins with "1."** Ensure "Include Revenue Accounts" box is unchecked. **OR**
 - ii. **Index that does NOT begin with "1."** Ensure "Include Revenue Accounts" box is checked.
 - b. Enter four-digit fiscal year.
 - c. Enter "14" in the fiscal period cell.

Create New Query ×

Commitment type

Fiscal Year*

Comparison Fiscal Year

Include Revenue Accounts

Fiscal Period*

Comparison Fiscal Period

- d. Check Accounted Budget, Year to Date, Commitments, and Available Balance.
- e. Click "Submit."

Operating Ledger

- | | |
|--|---|
| <input type="checkbox"/> Adopted Budget ⓘ | <input checked="" type="checkbox"/> Year to Date ⓘ |
| <input type="checkbox"/> Budget Adjustment ⓘ | <input type="checkbox"/> Encumbrance ⓘ |
| <input type="checkbox"/> Adjusted Budget ⓘ | <input type="checkbox"/> Reservation ⓘ |
| <input type="checkbox"/> Temporary Budget ⓘ | <input checked="" type="checkbox"/> Commitments ⓘ |
| <input checked="" type="checkbox"/> Accounted Budget ⓘ | <input checked="" type="checkbox"/> Available Balance ⓘ |

[SUBMIT](#)

8. View finance information (hidden in the screenshot for security purposes). Transactional information can be viewed by clicking the blue hyperlinks.

Budget Status by Account

Budgeting and Payroll Services - 302001

Query Results

Account	Account Title	FY23/PD14 Accounted Budget	FY23/PD14 Year to Date	FY23/PD14 Commitments	FY23/PD14 Available Balance
610111	Unclassified Positions				
610210	Classified Positions				
61030	Student Employment				
610320	Non Work-Study				
62000	Fringe and Health Benefits				
620110	State Health Benefit				
620111	State Dental Plan Benefit				
620116	Unemployment Insurance Benefit				
620210	SCRS Retirement Benefits				
620212	SCRS Death Benefit				
620214	TIAA ORP Retirement Benefit				
620215	Hartford ORP Retirement Benefit				
Report Total (of all records)					

Questions: Budget@cofc.edu