Self Service Banner- Budget Status by Account

Self Service Banner Link: https://selfservice.lafayette.edu/

1. Select **Finance** module
2. Select **My Finance Query**
3. Select **New Query** – top right
4. Create New Query box generates; any criteria with a red asterisk is mandatory to complete
   a. Select Query Type: **Budget Status by Account**
   b. Chart – L Lafayette College Chart of Accounts
   c. Organization
   d. Fiscal Year
   e. Fiscal Period (period 14 is for year-to-date activity)
   f. Operating Ledger – select Adjusted Budget, Year to Date, and Encumbrance
5. Click **Submit**
6. Report will generate with the following columns:
   a. Account
   b. Account Title
   c. Health – indicates if spend is below or above budget
   d. FY2X Adjusted Budget – includes any adjustments or budget transfers
   e. FY2X Year to Date – includes all year-to-date activity (unless a specific month is selected)
   f. FY2X Encumbrance – includes all year-to-date encumbrances
7. Click on any linked number to see what substantiates the budget, expense, or encumbrance for a more detailed view that includes invoices, transfer of charges, etc.
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Important Information:

1. Budget Status by Account is the only query type that provides information at the detail level
2. In the "New Query" screen, clear the **Program Code** selection to ensure all activity is captured
3. If you would like to see the difference between the Original Budget and the Adjusted Budget, select "FY2X Adopted Budget"