

Finance Dashboard - My Finance Query

Budget Quick Query User Guide

Part I - Gaining Access

1. Make sure you have authorized Fund/Organization (FOAPAL) access in Banner.

FOAPAL stands for six accounting elements of finance data in Banner: Fund, Organization, Account, Program, Activity and Location. FOAPAL authorization can also be called Fund-Organization Access. In Banner, all access to the (University and Foundation) Finance data is based on the Fund/Organization Access that has been authorized/established for an individual. **You must have (Approver, Originator or View) access on Fund/Organization before you can create any query.**

To request “Approver” access, submit a [FOAPAL Authorization - Approver](#) Request. This form can be used to replace approver access.








To request “Originator” or “View Only” access, submit a [FOAPAL Authorization - Originator/View](#) Request.

If necessary, you may run [Fund & Organization Access Report](#) reprot to check access for you or others. [What does Approver, Originator or View Access mean?](#)

2. Access Finance Dashboard **My Finance Query** Options.

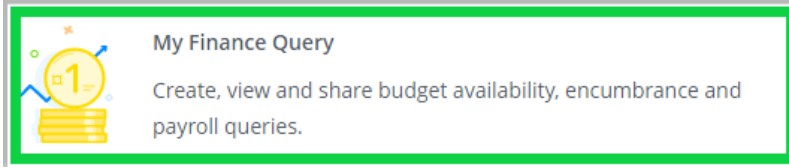
From the **Work Resources** tab of [My Missouri State](#), click on **Finance Dashboard** to start.

Or in the **NEW My Missouri State Portal**, use the **Discover** tool from the main menu and search “Finance”, select **Finance Resources** card and click on **Finance Dashboard** to start.

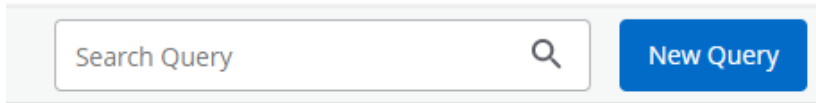
 My Finance Query Create, view and share budget availability, encumbrance and payroll queries.	 My Requisitions Create and view draft, pending and completed requisitions and supporting documentation.
 My Journals Create and view draft, pending and completed journals and supporting documentation.	 Purchase Orders (West Plains Only) Create purchase orders or purchase orders in process.
 Approve Documents View list of documents pending approval. Approve, disapprove, or deny.	 Budget Development Create and review fiscal year operating budgets for the budget development process.
 Delete Finance Template Delete templates for Finance Queries, Budget Development, and Purchase Orders.	

Part II – Create a Budget Quick Query

1. From **My Finance Dashboard** click on **My Finance Query** to start.



2. Click **New Query** to start.



3. Determine how you want to run your budget query by selecting the query type: **Budget Quick Query**.

Create New Query

Select Query Type



4. Select or search available values within each field: Chart, Fund, Organization and Fiscal Year

Create New Query

Values

Chart *

U MISSOURI STATE UNIVERSITY x v

Index

Choose Index v

Fund

A02000 OPERATING-SPRINGFIELD x v

Organization *

[REDACTED] -OP... x v

Account

Choose Account v

Program

Choose Program v

Activity

Choose Activity v

Location

Choose Location v

Commitment Type

All v

Include Revenue Accounts

Fiscal Year *

2020 x v

 SUBMIT

5. View Query Results. There is NO detail drilldown from a Budget Quick Query.

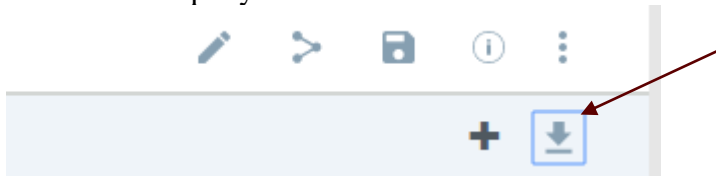
Budget Quick Query New Query

< [Icons]

Query Results [Download Icon]

Account	Account Title	Adjusted Budget	Year to Date	Commitments	Available Balance
73426	CHGS	\$0.00	\$1,255.50	\$0.00	(\$1,255.50)
73429	SVC-WORK ORDER	\$0.00	\$405.30	\$0.00	(\$405.30)
73430	SVC-FREIGHT(NOT COST OF SALES)	\$0.00	\$281.47	\$0.00	(\$281.47)
736	OTHER EXPENSES	\$28,006.00	\$0.00	\$0.00	\$28,006.00
73612	OTH-MEMBERSHIP DUES	\$0.00	\$295.25	\$0.00	(\$295.25)
73625	OTH-SUBSCRIPTIONS	\$0.00	\$389.67	\$0.00	(\$389.67)
73629	OTH-ADMIN FEE	\$0.00	\$22.42	\$0.00	(\$22.42)
81005	CAPITAL LEASE-STEINWAY	\$0.00	\$5,000.00	\$0.00	(\$5,000.00)
89999	EXPENSE CARRYFORWARD	\$613,149.29	\$0.00	\$0.00	\$613,149.29
Report Total (of all records)		\$4,464,805.11	\$906,824.13	\$1,669,050.81	\$1,888,930.17

6. Download query results into excel if desired.



7. Use “Edit Query” button to modify the values if needed. Use “Share Query” button to share the report if needed. Use the “Save” button to save the report if needed.

