CAS - Accessing Self-Service Banner Finance

Log into **myUSF** and click on **MyApps** under your user name.

myUSF��						Search		ddao -
	ACADEMICS	STUDENT SERVICES	HEALTH & WELLNESS	CAMPUS LIFE	OFFICES	SCHOOLS & CENTERS		Dashboard
								MyApps Logout
Top Apps						1	ANNOUNCEMEN	TS
	<u>OPEN</u> ENROLLMENT USEWORKS	DIRECTORY	CONCUR	Hilltop Shop Marketplace ជ Canvas ជ EMS (Book a Room) ជ Descuedo forma Davidence T			NEW Staying Resilient	t in a »
BANNER SELF- SERVICE (FACULTY)							NEW Moving Forward	n »
							The Passing of Christina Laskowski »	
				Personal Softwar Fac/Staff Email ਯ	e Purchases 🗅		Search Advisory Committee Update »	
VIEW ALL APPS 🔶				Fac/Staff Calenda	ar C'		2025 Benefits Open Enrollment »	

Then click on Banner Self Service (Finance).



Select My Finance Query and click on New Query.

My Finance Hello Create, edit and approve transactions and view financial info	ormation for department / organization.	
My Finance Query Create, view and share budget availability, encumbrance and payroll g		
My Journ Create and view draft, pending and completed journals and supporting documentation.		
Approve Documents View list of documents pending approval. Approve, disapprove, or deny.		
Delete Finance Template P Delete templates for Finance Queries, Budget Development, and Purchase Orders.	View Document View draft, pending and completed documents with related information and approval history.	
My Finance • My Finance Query		Search Olieny
Favorites Saved Queries Sh	ared Queries	↓ Low-High T 🖹

Select **Budget Status by Account** from the drop-down menu.



Values – Type in your FDF# or first/last name under **Fund** and 211042 under **Organization**, while leaving the **Program** field **blank** to capture all activities. Clear the **Program** field if the default value 1200-Research pops up.

Create New Query		×
Select Query Type		
Budget Status by Accou	~	
Values		
Chart*		Index
S University of San F	× •	Choose Index 🗸
Fund		Organization *
Choose Fund	^	211042 Arts & Scienc * *
FDF	Q	
280090		Program
E FDF Abdur Rahman Sa ra	imi	Choose Program 🗸
280091 E FDF Agha Nola		Location
280092 E EDE Amati Alexandra		Choose Location

Fiscal Year – Enter current fiscal year (2023), and fiscal period ${\bf 14}$ for year-to-date activities.

Fiscal Year*	2025	×	Fiscal Period*	14	×	
Comparison Fiscal Year	None	~	Comparison Fiscal Period	None	~	
Check the followin	g boxes.					
Operating Ledger						
Adopted Budget ①		Year to Date ①				
Budget Adjustment ①		C Encumbrance ①				
Adjusted Budget ①		Reservation ①				
Temporary Budget ①		Commitments ①				
Accounted Budget ①		Available Balance ①				
		SUBMIT				

Submit!

The bottom right corner is the current balance after the expenses are posted.

Save Query as Template

You can save the query as a template to reuse in the future. Click the "Save-as" icon to open a pop-up window.

