## CAS - Accessing Self-Service Banner Finance

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

USF Remote Info: All approved on-site employees and students must take our Dons Health Check survey every morning before entering any campus buildings. All residential students must complete daily. <u>Visit the USF Remote hub</u> to see all of our COVID-19 updates, actions, and resources in one place.					TAKE THE DONS HEALTH CH					
myUSF�		STUDENT SERVICES	ACADEMIC RESOURCES	CAMPUS LIFE	SCHOOLS + CENTERS	OFFICES			٩	pli7 👻 Dashboard
	COVID Resources Visit our resources page for the la covid RESOURCES	atest information about our i	actions, guidance, and	d resources to	keep our university (	community safe a	and informed.	Register for Spring 2021 Classes. REGISTER 🔷		MyApps Lop <sup>e</sup> nt
	Top Apps				Concur		í	ANNOUNCEMENTS [USF President] Yesterday's Events in Washington, D.C. »		-

Then click on **Banner Self Service (Finance)**.

	r	nyApps	
Q Start typing your o	question, or search with keywords		
myApps + Popular Apps			
myUSF	IAM Change Password       ☆	IAM Preferences ☆ ④	USFWorks
Banner 9 Ad	fmin ☆ ❹ ★ ④	Banner Self-Service (Finance)	BI ☆ 0

Select My Finance Query and click on New Query.

My Finance						
Hello Hello Create, edit and approve transactions and view financial information for department / organization.						
My Finance Query Create, view and share budget availability, encumbrance and payroll pr						
My Journ Create and view draft, pending and completed journals and supporting documentation.						
Approve Decuments View list of documents pending approval. Approve, disapprove, or deny.						
Delete Finance Template Delete templates for Finance Queries, Budget Development, and Purchase Orders.						

My Finance • My	Finance Quen	<i>l.</i>				
My Finance C	Query			Search Query	Q	New Query
	Favorites	Saved Queries	Shared Queries	Low-High	T B	

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

Create New Query				
Select Query Type				
Budget Quick Query	^			
	Q			
Budget Status by Account				
Budget Status by Organizational Hierarchy				
Payroll Expense Detail				
Encumbrance Query				
Multi Year Query				
Rudget Ouick Ouery				

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 Sami ra	Choose Program 🗸
280091 E FDF Agha Nola	Location
280092 E EDE Amati Alavandra	Choose Location

Fiscal Year – Enter current fiscal year (2023), and fiscal period **14** for year-to-date activities.

Fiscal Year *	2023	×v	Fiscal Period *	14	×v
Comparison Fiscal Year	None	*	Comparison Fiscal Period	None	*

## Check the following boxes.

Operating Ledger				
Adopted Budget ①	✓ Year to Date ①			
Budget Adjustment ①	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.

