

BANNER SELF-SERVICE FINANCE

HOW TO CHECK BUDGET

Prior to Completing Check Requests, Travel Authorizations, Travel Expense Claims, Contracts, or Entering Requisitions into Pioneer Purchase.

The image shows a screenshot of the Vol State Community College website. At the top, a dark blue navigation bar contains links for Students, Employees, Give, Workforce Training, Directory, Library, My Vol State (circled in red), and eLearn. Below this is a white header with the Vol State Community College logo on the left and a menu of links (About+, Admissions+, Academics+, Campus Life+, Financial+) and an Apply button on the right. The main banner features a light-colored background with a rope and three Polaroid photos of trees in winter, spring, and summer. The text 'Register early to get the classes you want!' is on the left. At the bottom, a dark blue bar contains the text 'Spring 2024 Registration is Now Open' and a link for details.

Students Employees Give Workforce Training Directory Library **My Vol State** eLearn

VOL STATE
COMMUNITY COLLEGE

About+ Admissions+ Academics+ Campus Life+ Financial+ **Apply**

Register early to get the classes you want!

Wintermester Spring Semester Summer Semester

Spring 2024 Registration is Now Open

Registration has begun for all currently enrolled students. [Click here for details.](#)

Select Finance Self-Service Banner 9

My Vol State

Pioneer Purchase Dynamic Forms Employee Information Webs... Employee Forms Plant Operations Request IT E-Mail BDM Web Access Zoom

Self-Service Banner Banner Admin Pages Edison Adobe Office 365 Argos/FormFusion/I ntellec... Thigpen Library TEST Application Systems Applications - not used o...

Student Applications eLearn & Online Resources Advising & Registration Faculty Services Ad Astra IT Phish Bowl **PASSWORD RESET** LibApps PageUp

Self-Service Banner 9 PRO... Self-Service Banner 9 TES...

Select My Finance Query

My Finance



Hello April,

Create, edit and approve transactions and view financial information for department / organization.



My Finance Query

Create, view and share budget availability, encumbrance and payroll queries.



Delete Finance Template

Delete templates for Finance Queries, Budget Development, and Purchase Orders.



View Document

View draft, pending and completed documents with related information and approval history.

Select Shared Queries

My Finance Query



New Query

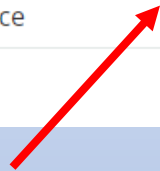
Favorites

Saved Queries

Shared Queries



Query Name	Query Type	Chart	Created By	Date
Budget with Encumbrance	Budget	V	Brett Duane Stoller	10/06/2023



Click anywhere in Budget with encumbrance field

Create New Query

Select Query Type

Budget Status by Organizational Hiera... ▼

Values

Enter your Index Code

Once you enter your Index the Fund, Organization, & Program will auto fill. You can enter an account number or leave blank.

Create New Query ✕

Select Query Type

Budget Status by Organizational Hiera... ▼

Values

Chart *	Index
V Volunteer State Community Colle... * ▼	Choose Index ▼
Fund	Organization *
Choose Fund ▼	999999 ** ▼
Account	Program
Choose Account ▼	Choose Program ▼
Activity	Location
Choose Activity ▼	Choose Location ▼

My Finance Query

Search Query

Favorites Saved

Query Name
Budget with Encumbrance

Date
10/06/2023

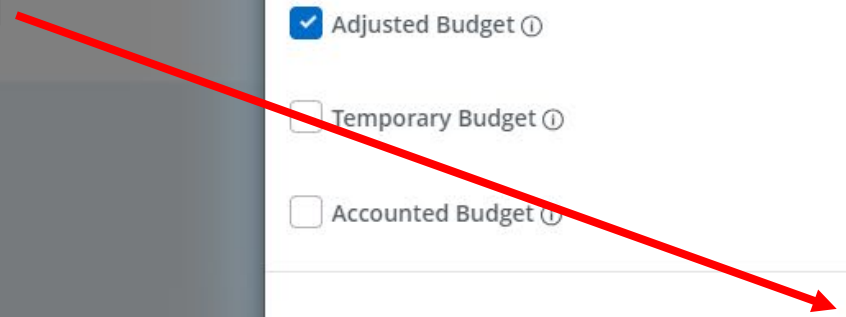
Create New Query

Comparison Fiscal Year	<input type="text" value="None"/>	Comparison Fiscal Period	<input type="text" value="None"/>
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Operating Ledger

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

Scroll down through the query, leaving all other fields as, at the bottom select SUBMIT



Select your Organization Number

Budget Status by Organizational Hierarchy

New Query

< Director of Purchasing and Contract - 308075



Query Results



Organization	Organization Title	Health	FY24/PD12 Adjusted Budget	FY24/PD12 Year to Date	FY24/PD12 Encumbrances	FY24/PD12 Available Balance
308075	Director of Purchasing and Contract		\$121,299.00	\$37,128.52	\$31,086.44	\$53,084.04
Report Total (of all records)			\$121,299.00	\$37,128.52	\$31,086.44	\$53,084.04

To see your operating expense balance you can drill down by clicking on 70

My Finance • My Finance Query • Budget Status by Organizational Hierarchy

Budget Status by Organizational Hierarchy

New Query

< Director of Purchasing and Contract - 308075



Query Results



Account Type	Account Type Title	Health	FY24/PD12 Adjusted Budget	FY24/PD12 Year to Date	FY24/PD12 Encumbrances	FY24/PD12 Available Balance
60	Salaries and Benefits		\$114,549.00	\$34,397.95	\$31,086.44	\$49,064.61
70	Expenses		\$6,750.00	\$2,730.57	\$0.00	\$4,019.43
Report Total (of all records)			\$121,299.00	\$37,128.52	\$31,086.44	\$53,084.04

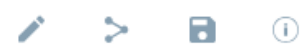
**This will show you your total operating expenses and the available balance.
You can continue to drill down for more information by selecting the account type you want to view.
For example: Operating Expenses**

[My Finance](#) • [My Finance Query](#) • Budget Status by Organizational Hierarchy

Budget Status by Organizational Hierarchy

New Query

Director of Purchasing and Contract - 308075



Query Results



Account Type	Account Type Title	Health	FY24/PD12 Adjusted Budget	FY24/PD12 Year to Date	FY24/PD12 Encumbrances	FY24/PD12 Available Balance
71	Travel	✓	\$750.00	\$0.00	\$0.00	\$750.00
74	Operating Expenses	!	\$6,000.00	\$2,730.57	\$0.00	\$3,269.43
Report Total (of all records)			\$6,750.00	\$2,730.57	\$0.00	\$4,019.43

You can see what has been spent, encumbrances, and which account numbers have been charged against your budget.

[My Finance](#) • [My Finance Query](#) • [Budget Status by Account](#)

Budget Status by Account

New Query

Director of Purchasing and Contract - 308075



Query Results



Account	Account Title	Health	FY24/PD12 Adjusted Budget	FY24/PD12 Year to Date	FY24/PD12 Encumbrances	FY24/PD12 Available Balance
74000	Operating Expense Budget Pool	✔	\$6,000.00	\$0.00	\$0.00	\$6,000.00
74230	Postal Charges	⚠	\$0.00	\$196.19	\$0.00	(\$196.19)
74490	Other Professional and Admin Srvs	⚠	\$0.00	\$2,534.38	\$0.00	(\$2,534.38)
Report Total (of all records)			\$6,000.00	\$2,730.57	\$0.00	\$3,269.43

You can continue to drill down for even further details by selecting the amount

[My Finance](#) • [My Finance Query](#) • [Budget Status by Account](#)

Budget Status by Account

New Query

Director of Purchasing and Contract - 308075



Query Results



Account	Account Title	Health	FY24/PD12 Adjusted Budget	FY24/PD12 Year to Date	FY24/PD12 Encumbrances	FY24/PD12 Available Balance
74000	Operating Expense Budget Pool	✓	\$6,000.00	\$0.00	\$0.00	\$6,000.00
74230	Postal Charges	⚠	\$0.00	\$196.19	\$0.00	(\$196.19)
74490	Other Professional and Admin Srvs	⚠	\$0.00	\$2,534.38	\$0.00	(\$2,534.38)
Report Total (of all records)			\$6,000.00	\$2,730.57	\$0.00	\$3,269.43

You can drill down even further by selecting the Document Code

[My Finance](#) • [My Finance Query](#) • [Budget Status by Account](#)

Budget Status by Account

New Query

Director of Purchasing and Contract - 308075



Query Results



Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
10/31/2023	11/03/2023	J0030558 ⓘ	October 23 Postage-Dir of Purchasin	\$196.19	J116

Budget Status by Account

You can also save your search to your favorites

New Query

Director of Purchasing and Contract - 308075



Query Results



Account	Account Title	Health	FY24/PD12 Adjusted Budget	FY24/PD12 Year to Date	FY24/PD12 Encumbrances	FY24/PD12 Available Balance
74000	Operating Expense Budget Pool	✓	\$6,000.00	\$0.00	\$0.00	\$6,000.00
74230	Postal Charges	⚠	\$0.00	\$196.19	\$0.00	(\$196.19)
74490	Other Professional and Admin Srvs	⚠	\$0.00	\$2,534.38	\$0.00	(\$2,534.38)
Report Total (of all records)			\$6,000.00	\$2,730.57	\$0.00	\$3,269.43

Budget Quick Query

[New Query](#)[Office VP for Business and Finance - 302075](#)

Query Results



Account	Account Title	Health	Adjusted Budget	Year to Date	Commitments	Available Balance
61101	Administrative Full Time	⚠	\$170,688.00	\$83,844.00	\$83,844.00	\$3,000.00
61106	Administrative Bonus	⚠		\$1,000.00	\$0.00	(\$1,000.00)
61301	Clerical and Support Full time	⚠		\$20,538.00	\$20,538.00	\$3,000.00
61306	Clerical and Support Bonus	⚠		\$1,000.00	\$0.00	(\$1,000.00)
62000	Employee Benefits Budget Pool	✅		\$0.00	\$0.00	\$93,943.00
62001	Hybrid TCRS Defined Benefit	⚠		\$848.62	\$0.00	(\$848.62)
62005	Hybrid TCRS Defined Contrib	⚠	\$0.00	\$1,076.90	\$0.00	(\$1,076.90)
62205	ORP Defined Contribution	⚠	\$0.00	\$7,640.46	\$0.00	(\$7,640.46)
Report Total (of all records)			\$313,707.00	\$129,330.32	\$105,817.27	\$78,559.41

Save as

Set as favorite

CANCEL SAVE

My Finance Query

[New Query](#)

- Favorites**
- Saved Queries
- Shared Queries

Low-High

VP Business & Finance Encumbrance

100%

\$105,817 remaining
\$472 liquidated of
\$106,289

01/25/2024

If you need assistance
please contact:

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or

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