

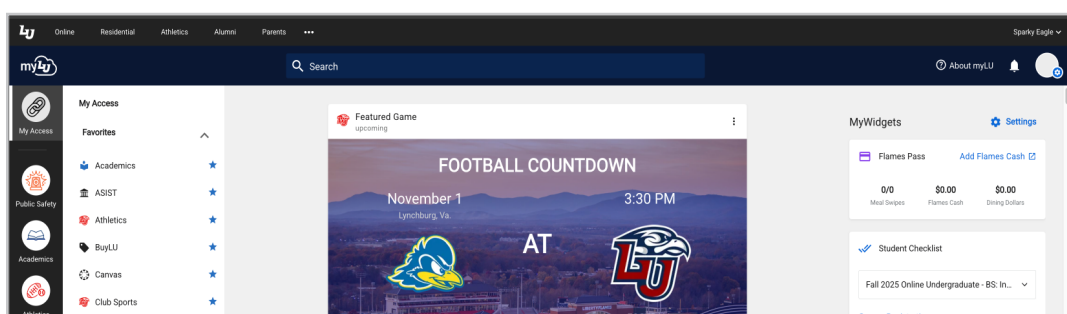
Banner 9 Self-Service

SSB9

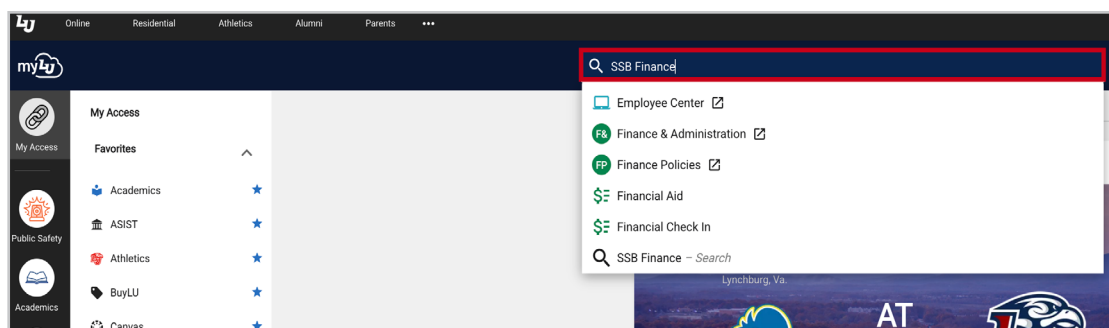
This guide provides step-by-step instructions for creating a budget query using the **SSB Finance** module within the SSB platform.

Accessing the Finance Module

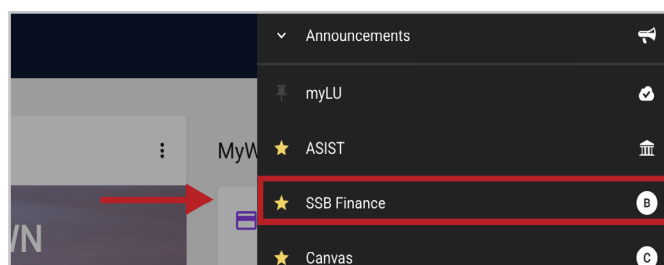
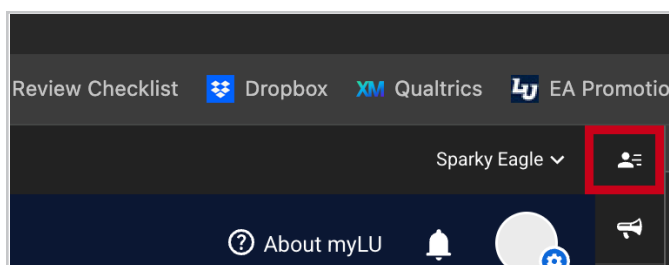
1. To access the SSB Finance module, navigate to **myLU.Liberty.edu** and sign in using your Liberty credentials.
2. You can access the **SSB Finance** module in two ways:



- **Option 1 : Use the Search Bar**
 - Locate the search bar at the top of the page
 - Type **SSB Finance**
 - Select the module from the search results

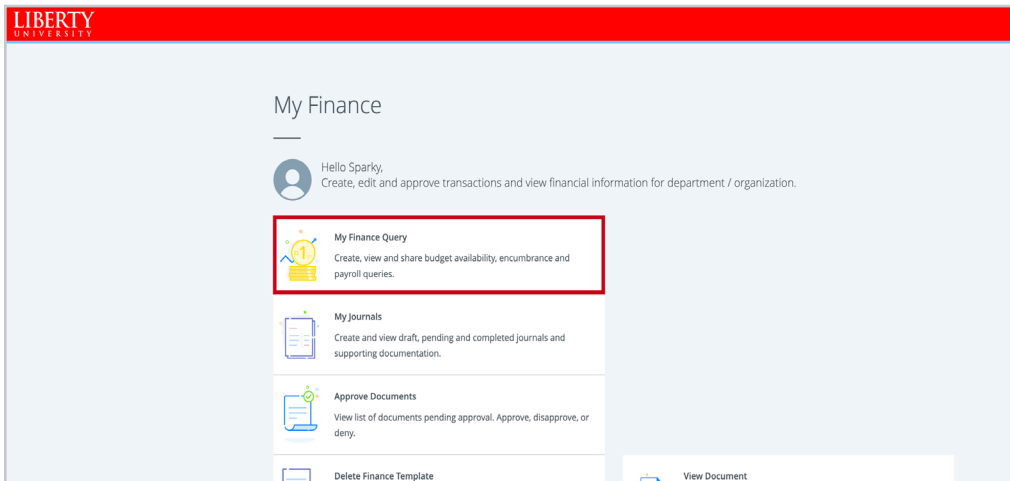


- **Option 2 : Use the Global Header**
 - Click the **Global Header** menu
 - Select **SSB Finance** from the list

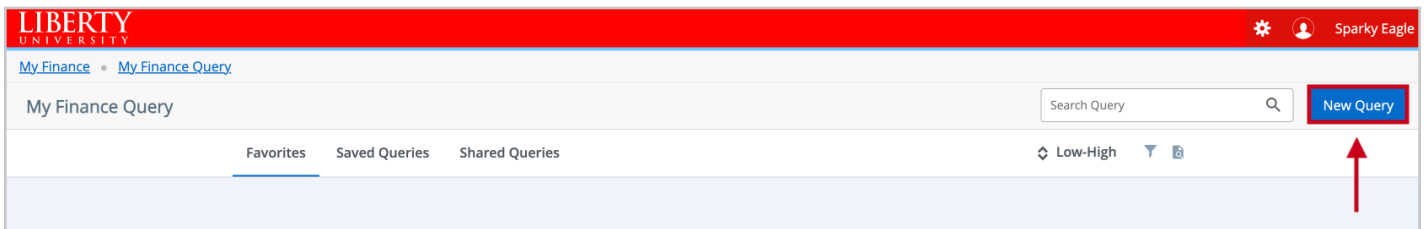


Creating a Query

1. In the SSB Finance module, click **My Finance Query**.



2. Click **New Query** in the top-right corner.



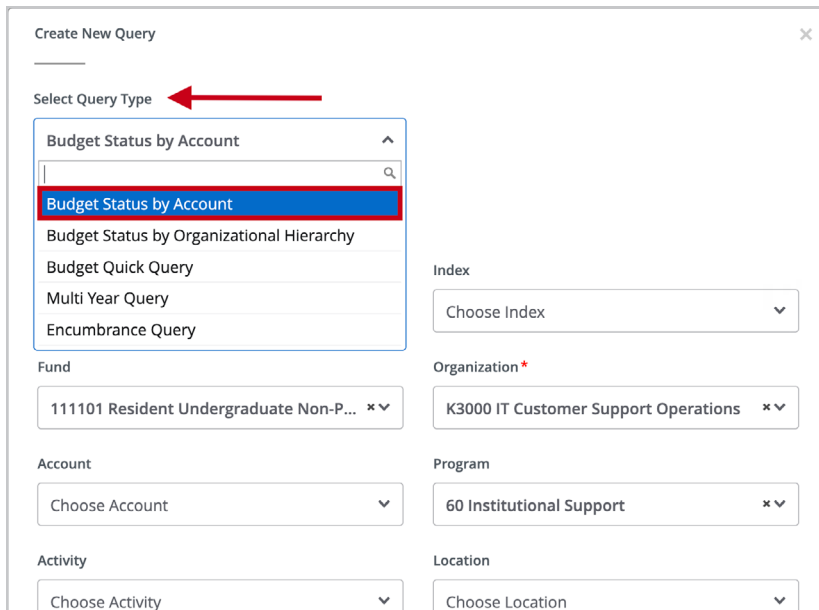
3. The **Create New Query** parameters box will appear.

A screenshot of the 'Create New Query' parameters box. It has a title bar with a close button. The first section is 'Select Query Type' with a dropdown menu showing 'Budget Status by Account'. The second section is 'Values' with several dropdown menus: 'Chart' (U Liberty University 7/1/09), 'Index' (Choose Index), 'Fund' (111101 Resident Undergraduate Non-P...), 'Organization' (K3000 IT Customer Support Operations), 'Account' (Choose Account), 'Program' (60 Institutional Support), 'Activity' (Choose Activity), and 'Location' (Choose Location).

4. Use the **Select Query Type** dropdown menu to choose the appropriate query type.

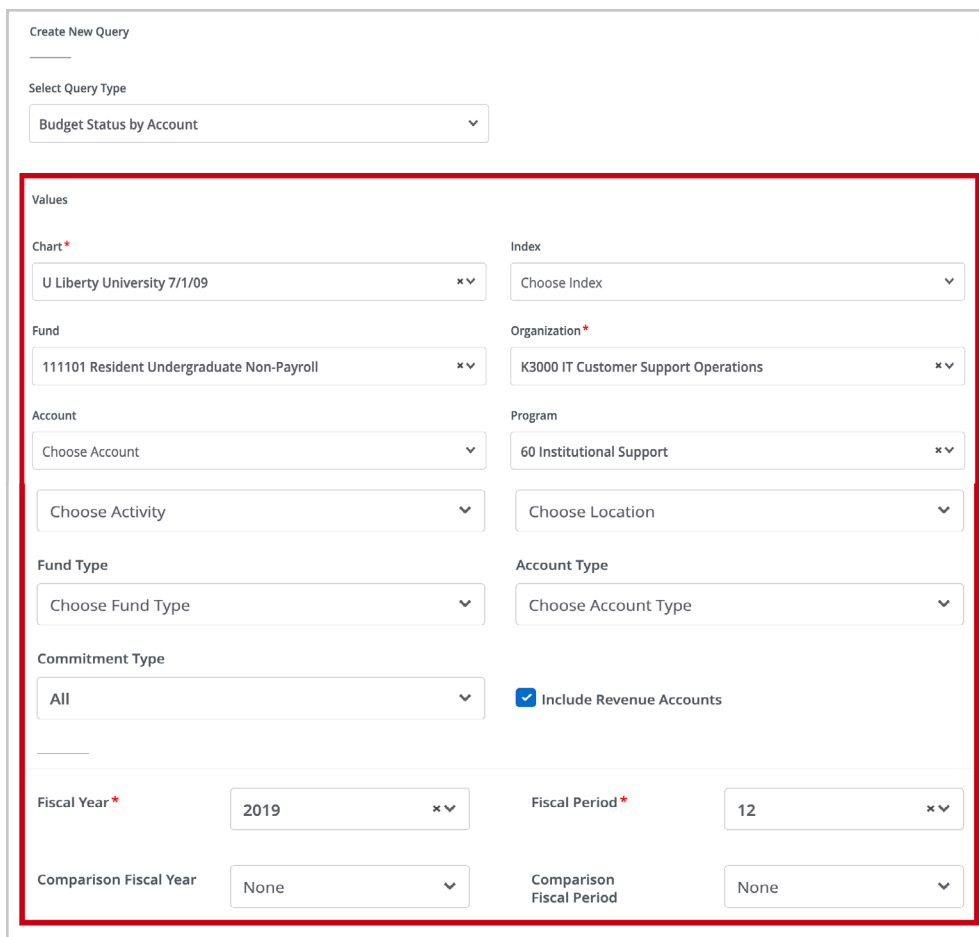
A screenshot of the 'Create New Query' parameters box, similar to the previous one. A red box highlights the 'Select Query Type' dropdown menu, which shows 'Budget Status by Account'.

5. To view your department's overall budget status, choose **Budget Status by Account**.



Note: The Budget Status by Account query displays all accounts used in the selected Fiscal Year and FOAPAL.

6. In the **Values** section, review the available budget fields and enter the relevant FOAPAL components (Fund, Organization, Account, Program, Activity, Location).



Note: Use 'U Liberty University 7/1/09' as the default Chart of Accounts. Set the Fiscal Period to '14' to capture full-year data.

This screenshot shows the 'Select Query Type' form. The 'Select Query Type' dropdown is set to 'Budget Status by Account'. Under the 'Values' section, the 'Chart' dropdown is highlighted with a red box and a red arrow pointing to it, showing 'U Liberty University 7/1/09'. The 'Fiscal Year' is set to '2019' and the 'Fiscal Period' is set to '14', both highlighted with red boxes and red arrows. Other fields include 'Fund' (111101 Resident Undergraduate Non-Payroll), 'Organization' (K3000 IT Customer Support Operations), 'Fund Type' (Choose Fund Type), 'Account Type' (Choose Account Type), 'Commitment Type' (All), and 'Include Revenue Accounts' (checked). The 'Comparison Fiscal Year' and 'Comparison Fiscal Period' are both set to 'None'.

7. In the **Operating Ledger** section, check the options boxes to include or remove them.

This screenshot shows the 'Create New Query' form. The 'Comparison Fiscal Year' and 'Comparison Fiscal Period' are both set to 'None'. The 'Operating Ledger' section is highlighted with a red box. It contains two columns of checkboxes, all of which are checked: 'Adopted Budget', 'Budget Adjustment', 'Adjusted Budget', 'Temporary Budget', 'Accounted Budget', 'Year to Date', 'Encumbrance', 'Reservation', 'Commitments', and 'Available Balance'. A red arrow points from the 'Budget Adjustment' checkbox to the 'Encumbrance' checkbox. At the bottom of the form, there is a 'SUBMIT' button.

8. Click **Submit** to generate the query results.

This screenshot shows the 'Create New Query' form with the 'Operating Ledger' section highlighted. The 'SUBMIT' button at the bottom is highlighted with a red box and a red arrow pointing to it. The checkboxes for 'Adopted Budget', 'Budget Adjustment', 'Adjusted Budget', 'Temporary Budget', 'Accounted Budget', 'Year to Date', 'Encumbrance', 'Reservation', 'Commitments', and 'Available Balance' are all checked.

Query Dashboard Options

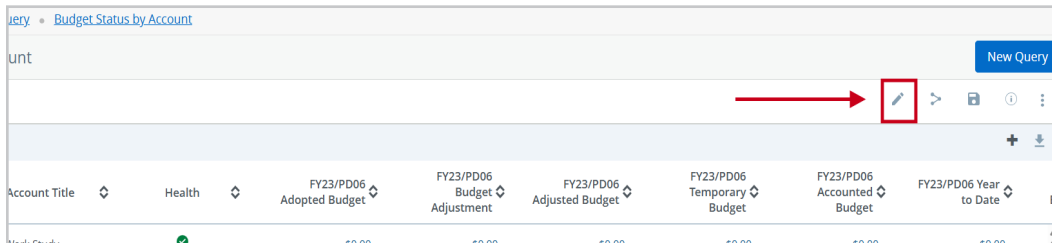
1. To save a query:
 - A. Click the **Save** icon
 - B. Type in the Query Name in the **Save as** field
 - C. Check the **Set as favorite** box to favorite the query
 - D. Click **Save**

The screenshot shows the Query Dashboard interface. At the top right, there is a 'New Query' button. Below it, a toolbar contains icons for edit, share, save, info, and a menu. The main area displays a table with columns for various budget categories. A 'Save as' dialog box is open in the center, allowing the user to name the query and choose whether to set it as a favorite. The 'Set as favorite' checkbox is checked, and the 'SAVE' button is highlighted in blue.

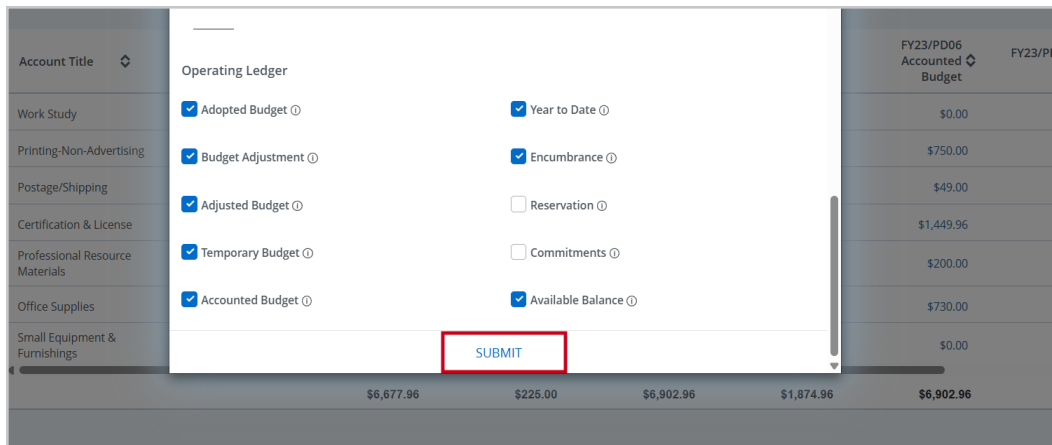
2. To share a query, click the **Share** icon. Select **Yes** to share the the query with associated users with your FOAPAL.

The screenshot shows the Query Dashboard interface. The 'Share' icon in the toolbar is highlighted with a red box. A confirmation dialog box is open, asking 'Do you want to share this query?'. The 'Yes' button is highlighted with a red box, indicating the user's selection to share the query.

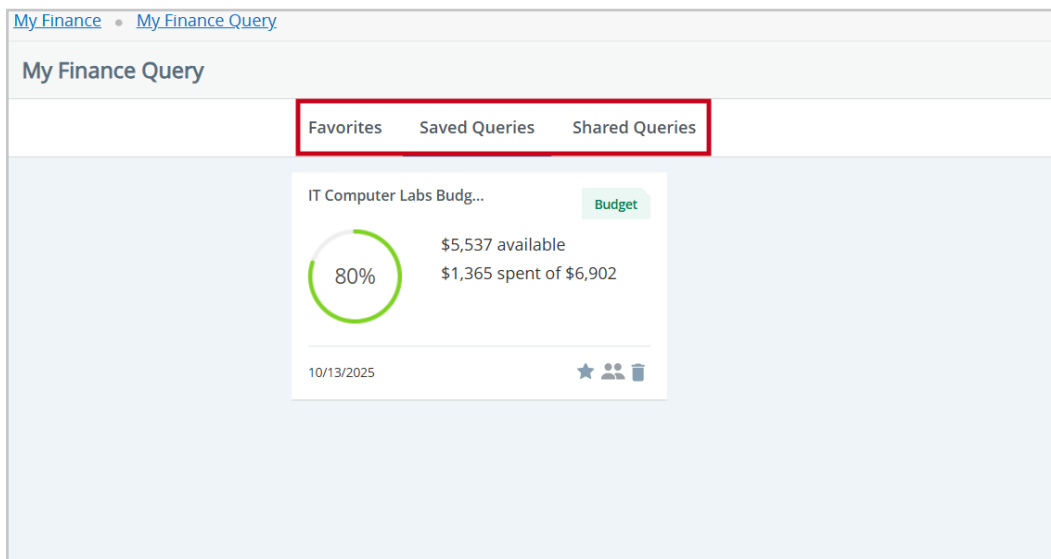
3. To review query parameters and make edits, click the **Edits** icon.



4. Click **Submit** to update the query.



5. All **Favorites**, **Saved**, and **Shared** queries will appear under their respective tabs in the My Finance Query module.



Need Assistance?

If you need assistance completing this process or have questions about the SSB9 Finance module, please contact ADS Finance at ADSFinance@liberty.edu.