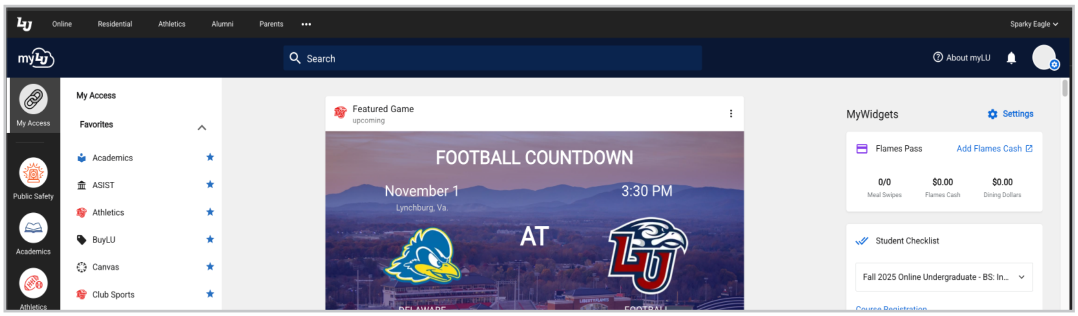
Banner 9 Self-Service

SSB9

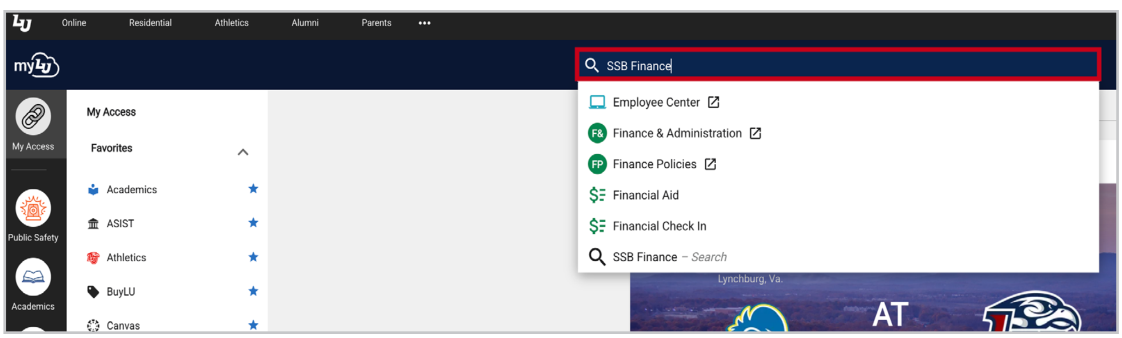
This guide provides step-by-step instructions for creating a budget query using the **SSB Finance** module within the SSB platform.

Accessing the Finance Module

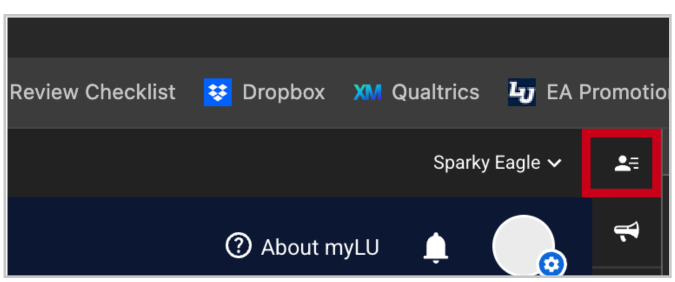
1. To access the SSB Finance module, navigate to **myLU.Liberty.edu** and sign in using your Liberty credentials.
2. You can access the **SSB Finance** module in two ways:

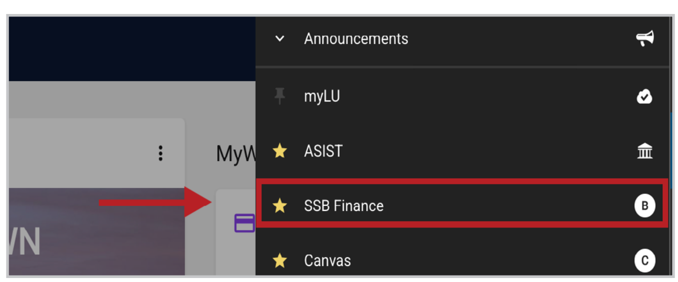


- **Option 1 : Use the Search Bar**
  - Locate the search bar at the top of the page
  - Type **SSB Finance**
  - Select the module from the search results



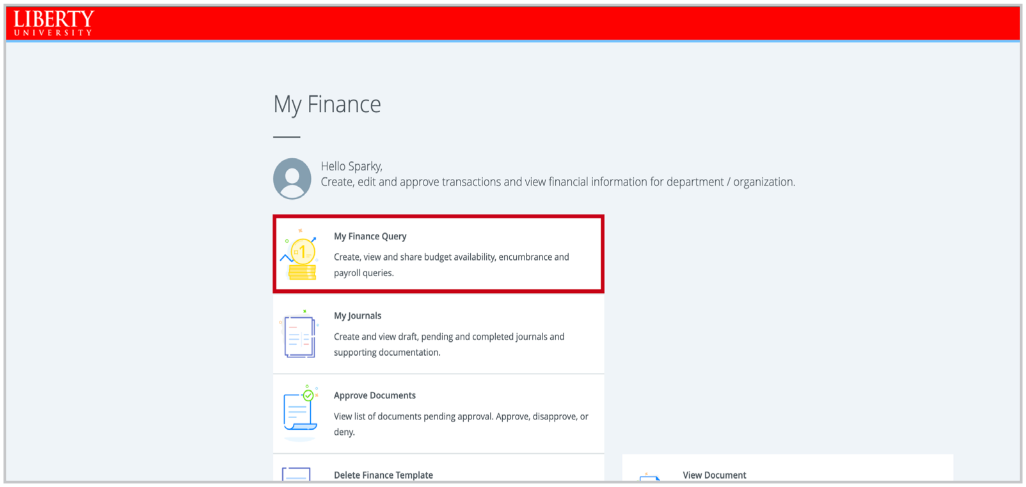
- **Option 2 : Use the Global Header**
  - Click the **Global Header** menu
  - Select **SSB Finance** from the list





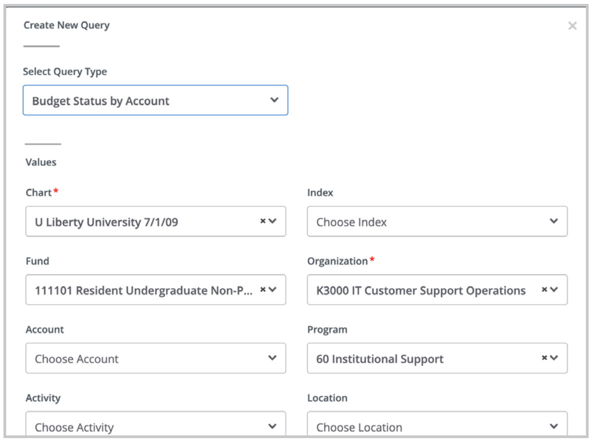
Creating a Query

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

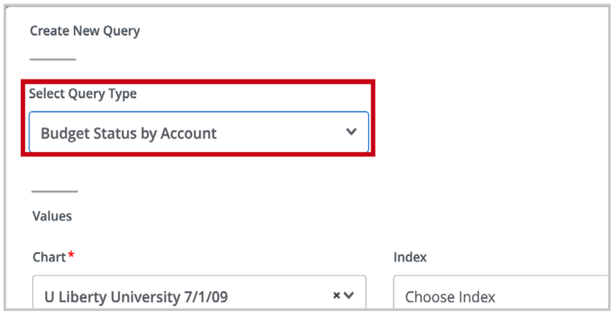


2. Click **New Query** in the top-right corner.

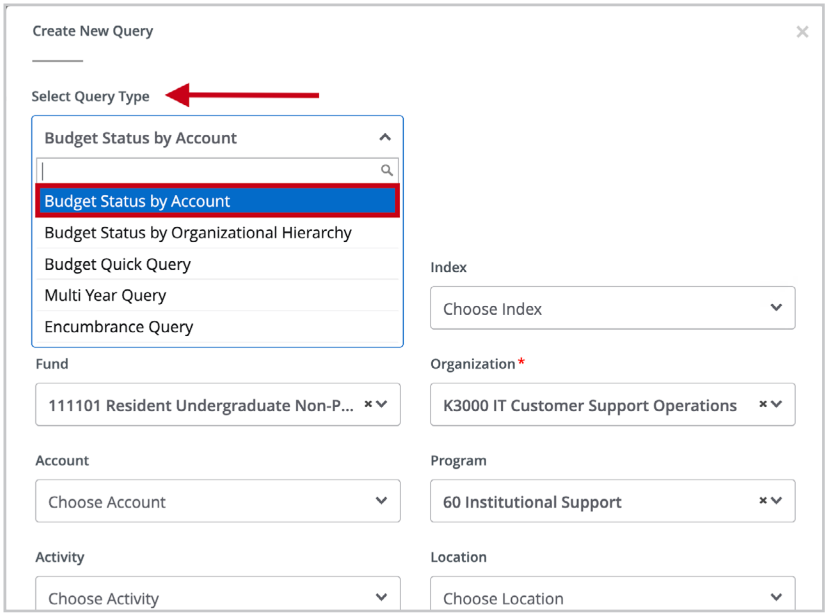
3. The **Create New Query** parameters box will appear.



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

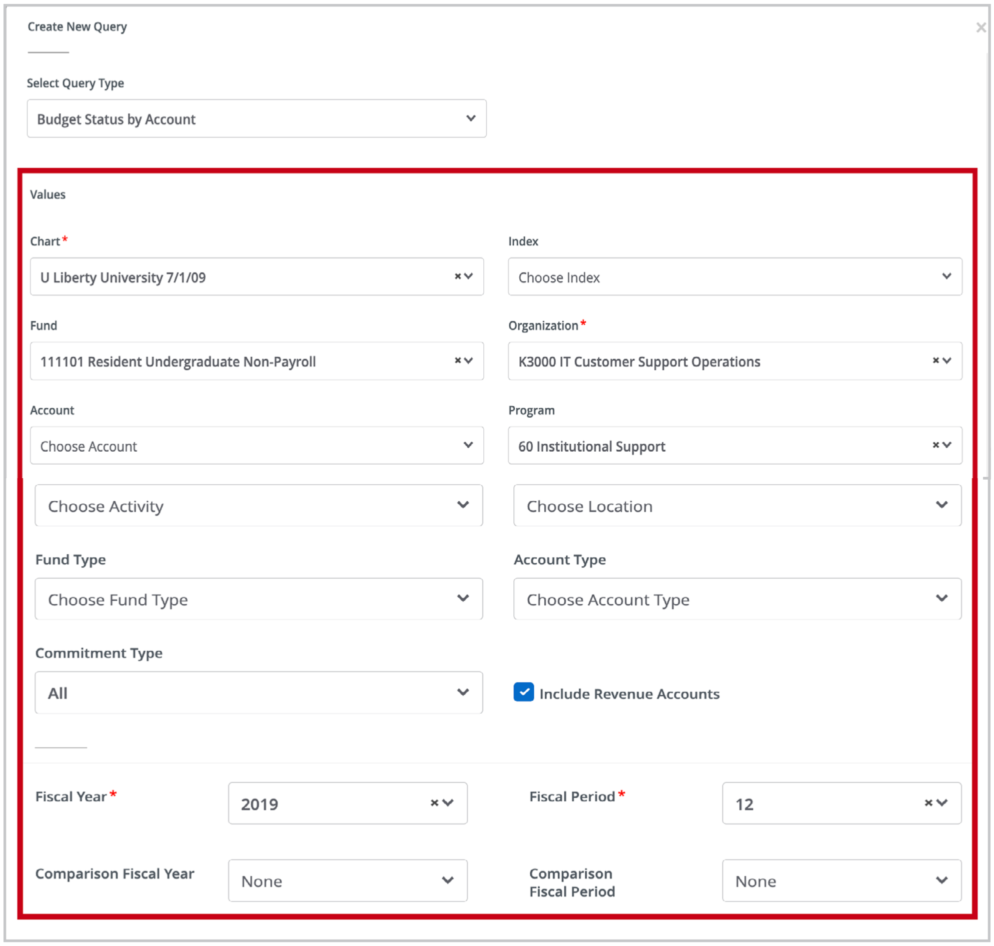


5. To view your department's overall budget status, choose **Budget Status by Account**.

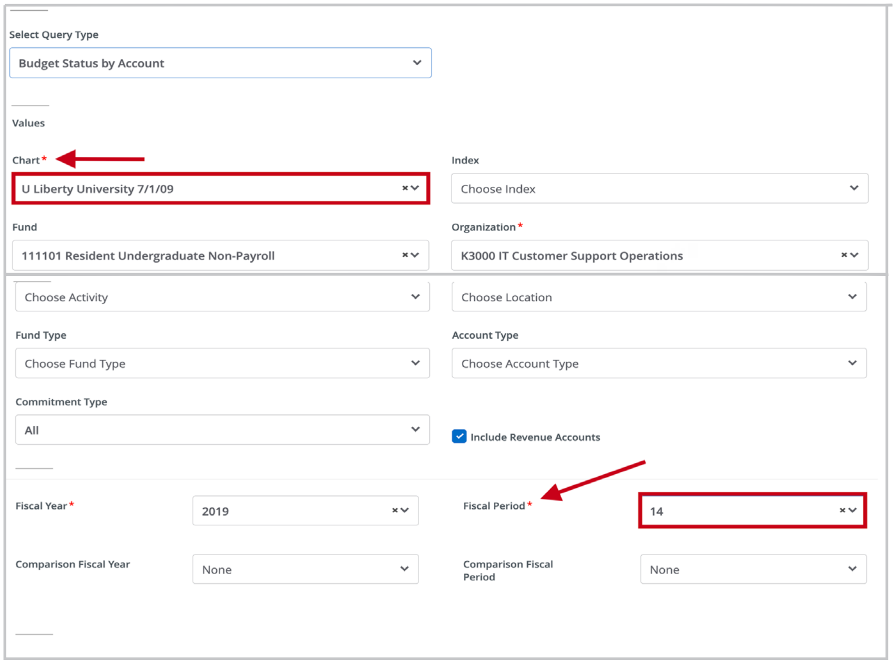


Note: The Budget Status by Account query displays all accounts used in the selected Fiscal Year and FOAPAL.

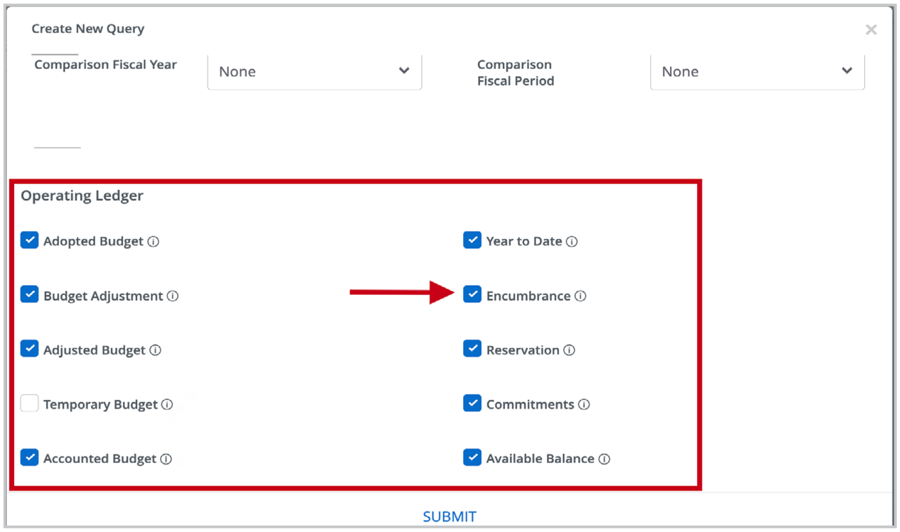
6. In the **Values** section, review the available budget fields and enter the relevant FOAPAL components (Fund, Organization, Account, Program, Activity, Location).



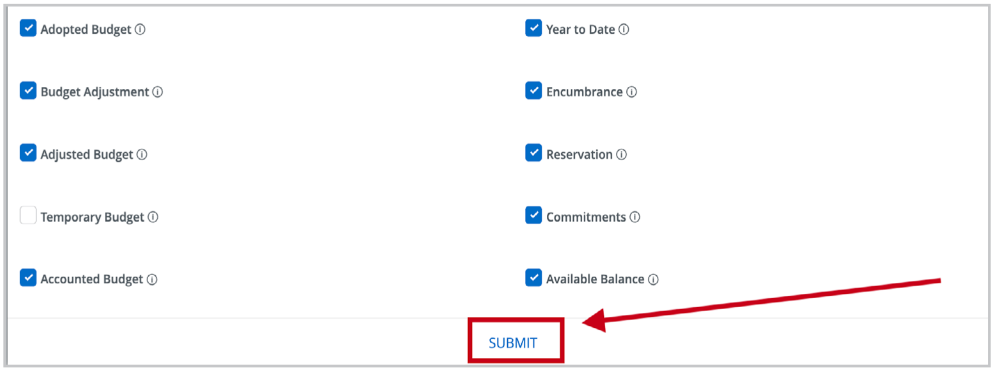
Note: Use ‘U Liberty University 7/1/09’ as the default Chart of Accounts. Set the Fiscal Period to ‘14’ to capture full-year data.



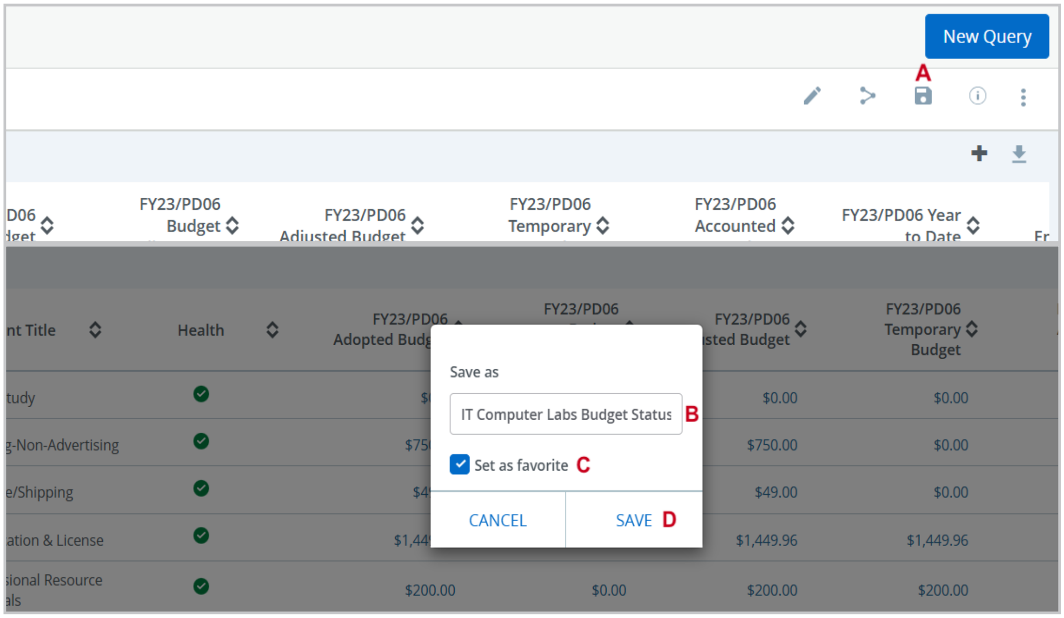
7. In the **Operating Ledger** section, check the options boxes to include or remove them.



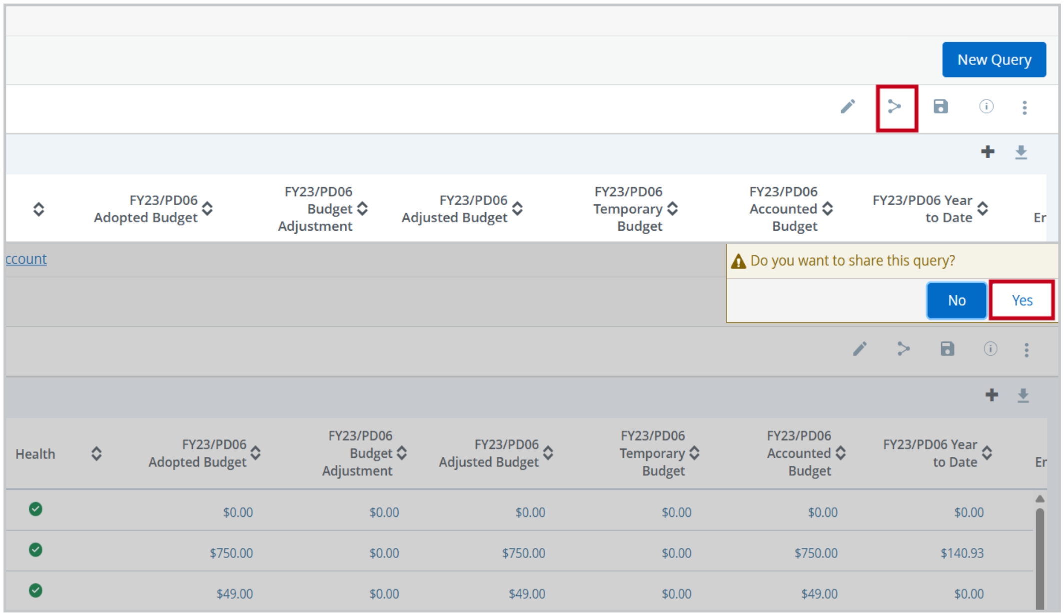
8. Click **Submit** to generate the query results.



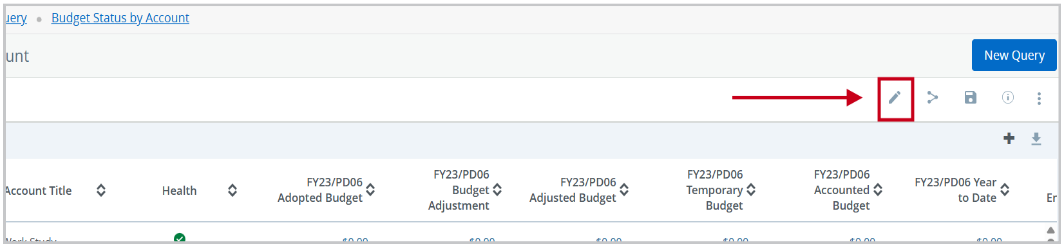
1. To save a query:
    A. Click the **Save** icon
    B. Type in the Query Name in the **Save as** field
    C. Check the **Set as favorite** box to favorite the query
    D. Click **Save**



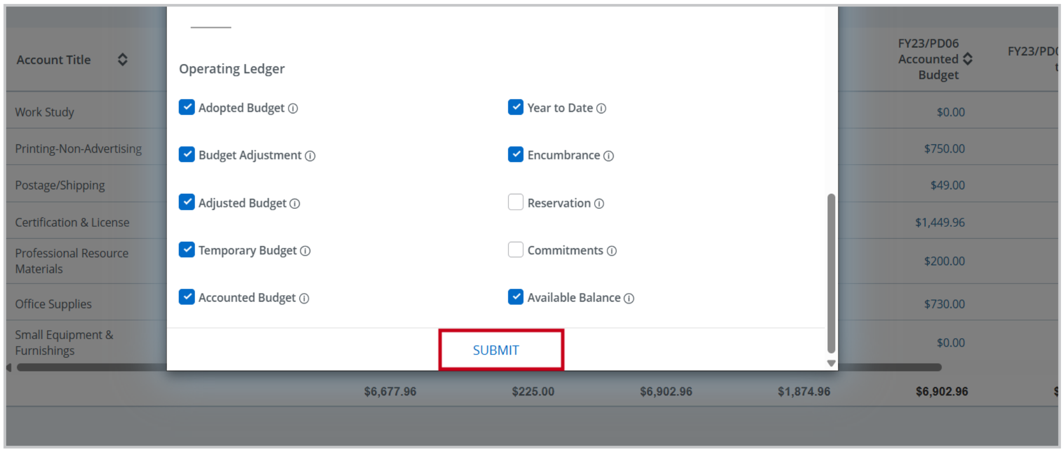
2. To share a query, click the **Share** icon. Select **Yes** to share the the query with associated users with your FOAPAL.



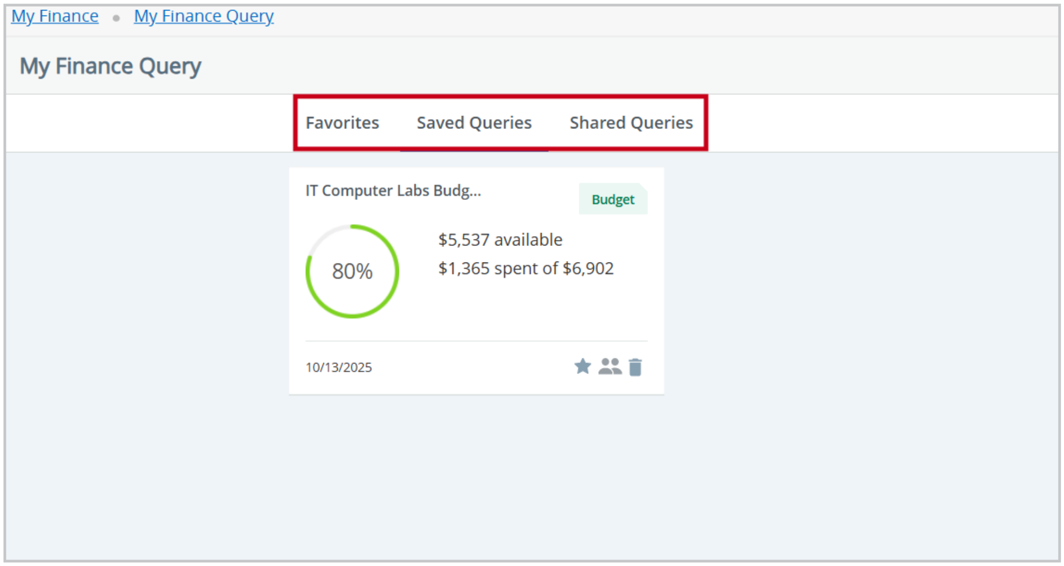
3. To review query parameters and make edits, click the **Edits** icon.



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.