Budget Queries in Banner (SSB)

Go to the sign in page on the CC webpage. http://www.coloradocollege.edu

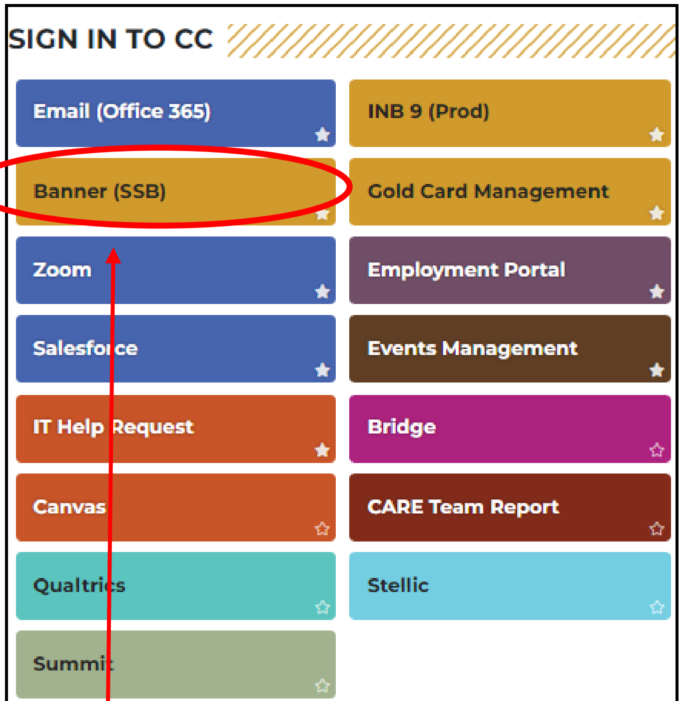

Fig. 1

Click on Banner (SSB)

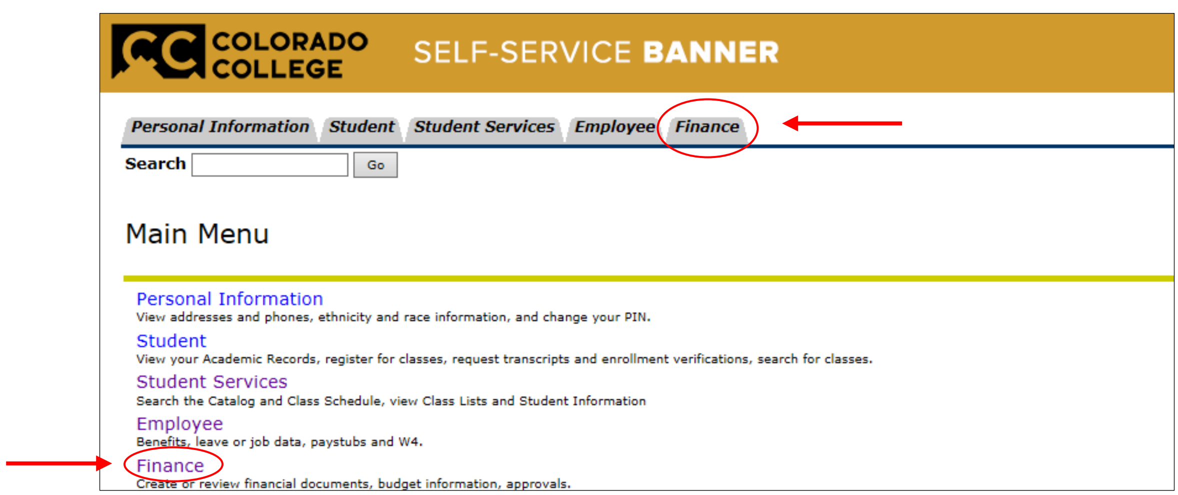

Fig. 2

Once you are in Banner (SSB) you'll see a screen with a Finance option. Click on it (in either place.)
If you do not have the Finance tab, please contact our office to set up your permissions, so you have access to query your fund(s).

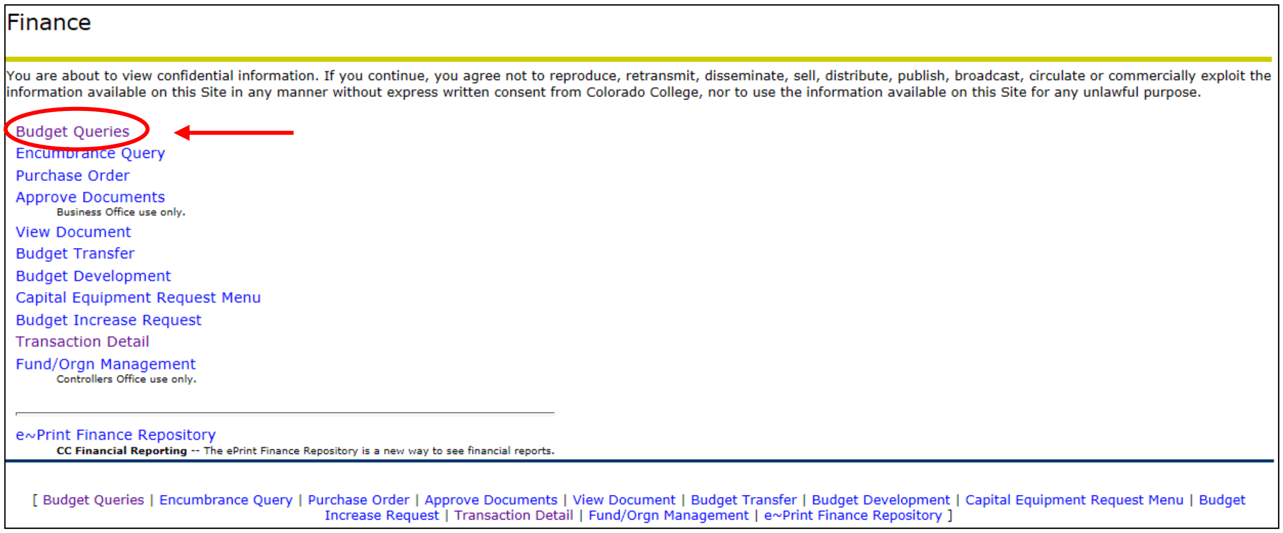

Fig. 3

This will take you to the Finance page. Please select the first option "Budget Queries".

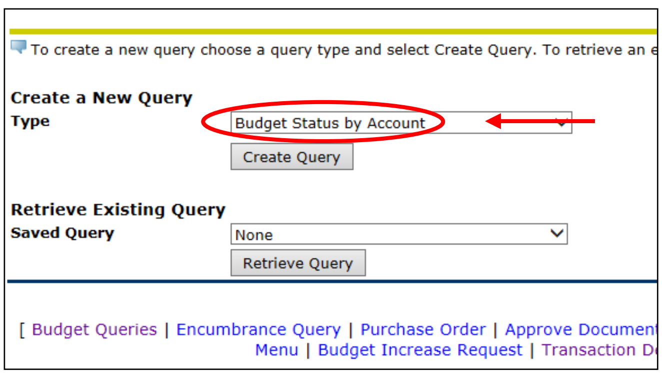

Fig. 4

In the "Create a New Query" section, select "Budget Status by Account". [Create Query]

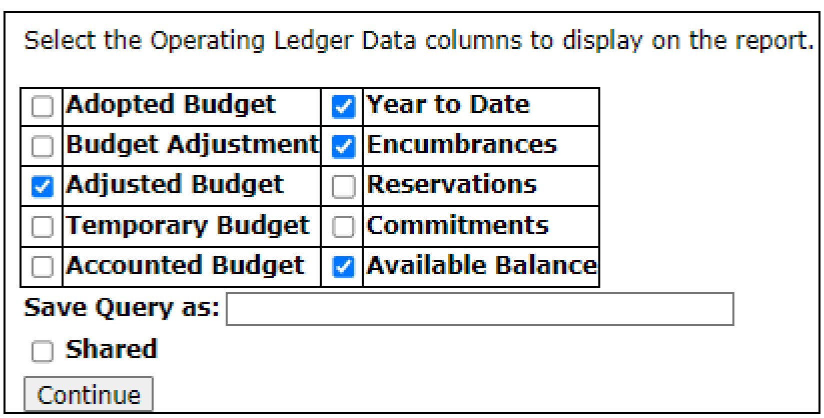

Fig. 5

This next screen is where you select the data you wish to see. Select the four checkboxes shown above. [Continue]

Now you will enter the search parameters for a basic Budget Query.

Fiscal Year 2025-26 is our current fiscal year and is shown as '2026' in the Fiscal Year field. Please put 14 in the fiscal period and leave it there. This ensures that you will capture 100% of the data in the fund. To view prior year data, use the dropdown in the Fiscal Year field.

Use the same parameters as in Fig. 6 below except with the Fund and Organization codes for your dept/budget. [Submit Query] The more parameters you enter, the more specific the results will be. For example, if you enter '7%' in the Account field, the results will be limited to activity in the Expense accounts. The '%' sign is the wildcard.

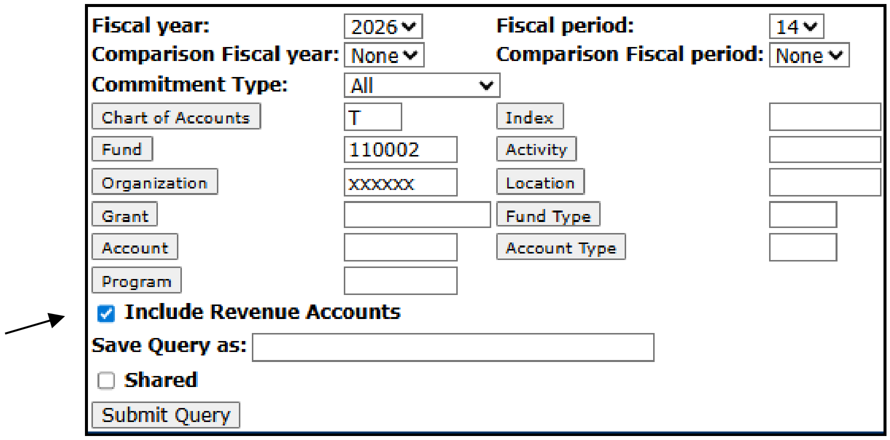

Fig. 6

Note: in the above screen the "Include Revenue Accounts" box is checked. If you want to see if any money has been deposited into your fund during the fiscal year, you will need to check this box. Revenue is defined as 'new' money into the college. If you are receiving funds from the Dean's Office, or other support from campus entities, these entries will NOT show up as Revenue, but will be posted to your account through a journal entry and will appear as a credit to a 7 or 8 account. [Submit Query]

Query Results

Account	Account Title	FY21/PD14 Adjusted Budget	FY21/PD14 Year to Date	FY21/PD14 Encumbrances	FY21/PD14 Available Balance
701001	Instructional Supplies	0.00	52.45	0.00	(52.45)
701051	Office Supplies	0.00	254.99	0.00	(254.99)
701053	Books	0.00	701.48	0.00	(701.48)
701055	Subscriptions	0.00	24.98	0.00	(24.98)
701501	Other Supplies	0.00	31.85	0.00	(31.85)
705001	Postage	0.00	100.70	0.00	(100.70)
707503	Meals - Non Travel	0.00	159.95	0.00	(159.95)
707504	Meeting Refreshments	0.00	36.82	0.00	(36.82)
708993	PCard Used in Error for Pers. Exp.	0.00	14.18	0.00	(14.18)
709003	Prior Year Rollforward	5,229.33	0.00	0.00	5,229.33
710521	Software Support and Maintenance	0.00	536.79	0.00	(536.79)
810000	Transfers	0.00	(4,000.00)	0.00	4,000.00
Report Total (of all records)		(5,229.33)	2,085.81	0.00	

Year to Date activity

Fig. 7

The above screen shows a fund with all activity to date. **Note: anything in blue can be clicked on to 'drill down' and see greater detail.**

In this example, the left column titled 'Account' shows account numbers starting with 7 and 8.

5-Accounts = Revenue
6-Accounts = Salary & Benefits
7-Accounts = Expenses
8-Accounts = Transfers

Depending on the type of fund you are querying, it may have funds that roll forward into the next fiscal year.

The roll-forward amount will be listed in the "Adjusted Budget" column under account 709003 - Prior Year Rollforward. In Fig. 7 above, there is a positive rollforward of $5,229.33. The Net Balance in the Year-to-Date column is a positive $2,085.81. The Available Balance is $5,229.33 + $2,085.81 = $7,315.14.