

## **Banner Self Service**

### **Reading Budgets**

#### **Budget Query By Account**

When your organization does not have revenue:

- Do **NOT** check the revenue box. On the screen, you will see your true balance in the bottom right hand corner of the table.

If the organization does have revenue:

- Check the include revenue box. A balance will not appear in the bottom right hand corner of the table. If you wanted to manually calculate your balance:
  1. Take the opposite sign of the adjusted budget (report total at the bottom of the adjusted budget column).
  2. Add (or subtract if the amount is negative) the year-to-date amount (report total at the bottom of the year-to-date column).
  3. Add (or subtract if the amount is negative) the commitments amount (report total at the bottom of the commitments column).
  4. Your calculation should be your true balance.

#### **Budget Query by Organizational Hierarchy**

When your organization does not have revenue:

- Do **NOT** check the revenue box. On the screen, your true organizational balance will be in the available balance column.

If the organization does have revenue:

- Check the include revenue box. Your balance will show up in the available balance column, however, your balance will be the opposite sign of the balance you are seeing. (Example – If I get to this screen and I see my available balance is (100,000.00), I actually have 100,000.00 left to spend. On the contrary, if I get to this screen, and my available balance says 100,000.00, I am actually in the hole by that much.)