

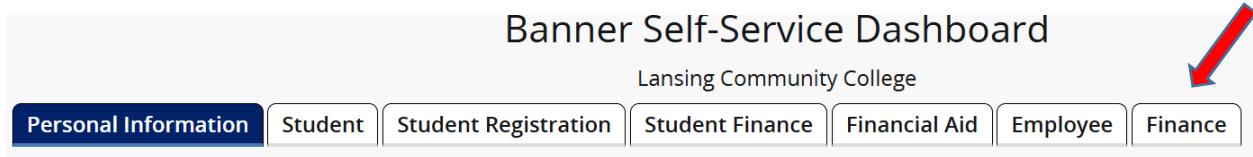
Navigating to Finance Grant Budget Queries – Banner Self-Service

Purpose: Query Grant budget and expenditure information in Banner by FOAPAL element

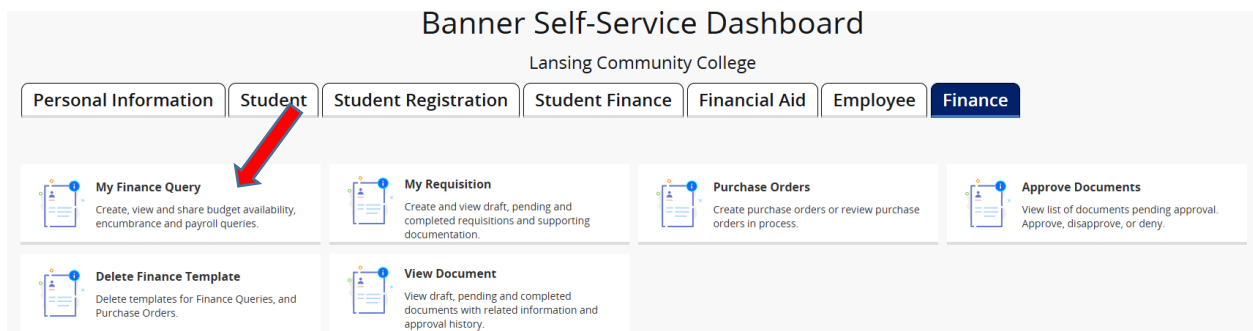
1. Log into MyLCC and click on the Banner link in the upper right-hand menu



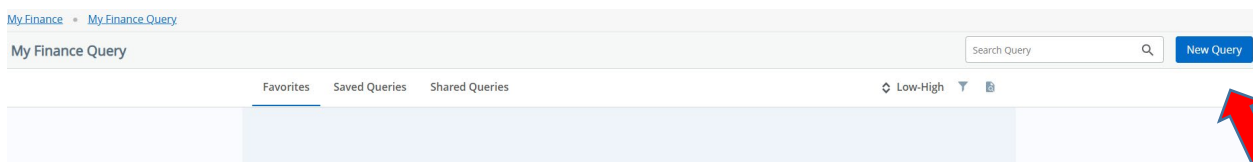
2. Click on the Finance Tab in the Banner Self-Service



3. Click on My Finance Query



4. Click on New Query Button



5. A pop-up box will appear. Navigate to each section by using the Tab button on the keyboard or scroll with a mouse.


- **Select Query Type:** In drop-down list, choose “Multi Year Query”


Create New Query


Select Query Type

Multi Year Query 

- **Values:** In drop-down Lists, fill in the Chart and Grant at a minimum. The wildcard symbol, %, can be used to pull up multiple organizations, accounts, etc
 - Lookup up grant number using drop down list. Use wild card symbol for search. For example, to search for 26 Perkins, use %26%Perkins%. Click on the desired

Grant * 

Choose Grant 
















G00000299
FY26 Perkins Regional Allocation

G00000300
25-26 Perkins Local Leadership

grant.

- Perkins Note: Fill in the Activity code provided for the project to narrow the data returned to the specific project.

Chart *	Index
<input type="text" value="L Lansing Community College"/>  	<input type="text" value="Choose Index"/> 
Fund	Grant *
<input type="text" value="Choose Fund"/> 	<input type="text" value="G00000299 FY26 Perkins Regional Allocation"/>  
Organization	Account
<input type="text" value="Choose Organization"/> 	<input type="text" value="Choose Account"/> 
Program	Activity
<input type="text" value="Choose Program"/> 	<input type="text" value="PK0240 Perkins HHS EMS Ventilator"/> 
Location	Fund Type
<input type="text" value="Choose Location"/> 	<input type="text" value="Choose Fund Type"/> 
Account Type	<input type="checkbox"/> Include Revenue Accounts
<input type="text" value="Choose Account Type"/> 	

- **Dates:** From date will auto populate to effective date of grant. Change it if you only want it to include a specific time frame. If Date To is left blank, it will default to current date. Check the Compare box and add dates if you want a comparison.

Date From* x v x v

Date To v v


Compare


Date From*


Date To


- **Grant Ledger:** Click on the boxes: Accounted Budget, Year to Date, Encumbrance, Reservation, Commitments and Available Balance



Grant Ledger

Adopted Budget ⓘ  Year to Date ⓘ

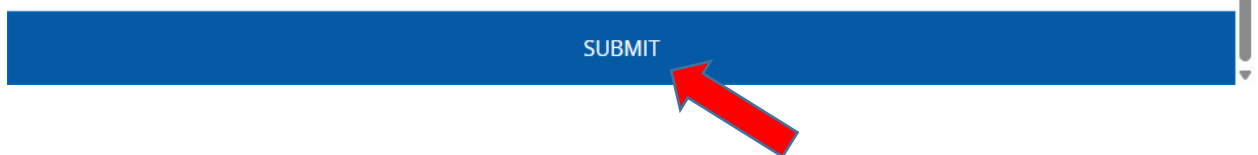
Budget Adjustment ⓘ  Encumbrance ⓘ

Adjusted Budget ⓘ  Reservation ⓘ

Temporary Budget ⓘ  Commitments ⓘ

 Accounted Budget ⓘ  Available Balance ⓘ

- Move mouse over the word submit and right click once the bar turns blue.



6. The query results show expenditure summary by account.

Description	
Account	Account code
Account Title	Account code title
From GYxx/PDxx Adjusted Budget	Budget loaded for the grant year queried. This includes the adopted budgeted and any adjustments made to the budget to date.
From GYxx/PDxx Year to Date	Sum of expenses posted to date in the specific account
From GYxx/PDxx Encumbrances	This shows all purchase orders that have been issued for a particular account code. When a purchase order is completed and approved in Banner, an encumbrance is automatically created. As payments are made relating to a purchase order, encumbrances are liquidated. Payment amounts are added to the YTD Activity column and liquidated amounts are subtracted from the Encumbrances column.
From GYxx/PDxx Reservations	This shows all requisitions that have been approved but processed into purchase orders. When a purchase order is completed and approved in Banner, the reservation is liquidated and the funds are encumbered. The amounts are added to the Encumbrances column and liquidated amounts are subtracted from the Reservations column.
From GYxx/PDxx Commitments	Sum of Encumbrances and Reservations.
From GYxx/PDxx Available Balance	Adjusted Budget minus YTD Activity minus Commitments (Encumbrances + Reservations) for the account. Note: This only sums across the line item and does not sum for Hi-Account minus Natural Account. Line items with zero budget will display a negative value.

Multi Year Query

New Query

< FY26 Perkins Regional Allocation - G00000299



Query Results



Account	Account Title	From GY25/PD01 To GY25/PD12 Adjusted Budget	From GY25/PD01 To GY25/PD12 Year to Date	From GY25/PD01 To GY25/PD12 Encumbrances	From GY25/PD01 To GY25/PD12 Reservation	From GY25/PD01 To GY25/PD12 Commitments	From GY25/PD01 To GY25/PD12 Available Balance
724	Capital Furniture and Equipment	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00
8109	Capital Asset Funding	\$0.00	\$8,804.28	\$0.00	\$0.00	\$0.00	(\$8,804.28)
Report Total (of all records)		\$10,000.00	\$8,804.28	\$0.00	\$0.00	\$0.00	\$1,195.72

7. Click on any number displayed in “blue” font to drill-down to see expenditure details.

Form Fields	Description
Account Codes	Begins with: 61 = Salary/Wages 62 = Benefits 7 = Services and Supplies 8 = Transfers