

## Budget Queries (SSB8 and SSB9)

### Things to Note

- Ellucian has not completed the transformation of Banner 8 Finance Self-Service functionality to Banner 9 Finance Self-Service. Therefore, ACCS will use SSB8 and SSB9.
- One budget query must be completed in SSB8 before using SSB9 for budget queries.
- It is recommended to use the Google Chrome Web browser to access Finance Self-Service.

### SSB8 Budget Query Process

#### SSB8 URL:

[https://ssb-prod.ec.accs.edu/ssomanager/saml/login?relayState=/c/auth/SSB?campus=https://ssb-prod.ec.accs.edu/PROD/ACCSO/twbkwbis.P\\_GenMenu?name=bmenu.P\\_MainMnu&accessibility=false](https://ssb-prod.ec.accs.edu/ssomanager/saml/login?relayState=/c/auth/SSB?campus=https://ssb-prod.ec.accs.edu/PROD/ACCSO/twbkwbis.P_GenMenu?name=bmenu.P_MainMnu&accessibility=false)

### Banner 8 Finance Self-Service

To log into Finance Self-Service:

1. Enter the URL address for Banner Self-Service 8 (See URL above).
2. Enter your User ID and password in the corresponding fields, and click **Sign In**.

 ellucian.

Sign in to your account

rhead@accs.edu

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Sign In

Remember me on this computer

## Main Menu SSB8

1. Select **Finance Tab**.

ssb-prod.ec.accs.edu/PROD/ACCSO/twbkwbis.P\_GenMenu?name=bmenu.P\_MainMnu

Employee Finance

Search  Go

ACCESSIBILITY SITE MAP HELP EXIT

Main Menu Your current Institution is ACCSO

**Employee**  
Time sheets, time off, benefits, leave or job data, paystubs, W2 forms, W4 data.

**Finance**  
Create or review financial documents, budget information, approvals.

RELEASE: 8.9.1

2. Select **Budget Queries**.

ssb-prod.ec.accs.edu/PROD/ACCSO/twbkwbis.P\_GenMenu?name=bmenu.P\_MainMnu

Employee Finance

Search  Go

RETURN TO MENU SITE MAP HELP EXIT

Finance Your current Institution is ACCSO

**Budget Queries**

Encumbrance Query

Requisition

Approve Documents

View Document

Budget Transfer

Multiple Line Budget Transfer

Delete Finance Template

[ Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer | Delete Finance Template ]

RELEASE: 8.9.1

3. Select the **Budget Quick Query** from the Type drop down menu. This will allow you to view summarized budget information for organizations. Select **Create Query** to review output.



Employee Finance

Search  Go

MENU SITE MAP HELP EXIT  
Your current Institution is ACCSO

### Budget Queries

To create a new query choose a query type and select Create Query. To retrieve an existing query choose a saved query and select Retrieve Query.

**Create a New Query**  
Type: Budget Quick Query  
Create Query

**Retrieve Existing Query**  
Saved Query: None  
Retrieve Query

[ Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer | Delete Finance Template ]

RELEASE: 8.7.0.2

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4. Enter your departmental Fund and Organization. Please refer to your handout for your department's frequently utilized accounts and **Submit Query**.



Employee Finance

Search  Go

MENU SITE MAP HELP EXIT  
Your current Institution is ACCSO

### Budget Queries

Enter a value in either the Organization or Grant fields as well as the Fiscal Year and Chart of Accounts fields. If Grant is populated then resulting information is inception through the end of the fiscal year, from Grant Ledger. Otherwise, all information retrieved is through the fiscal year to date.

Fiscal year: 2020  
Chart of Accounts: 1 Index  
Fund: 110100 Grant  
Organization: 100110 Account  
Program: Activity  
Location: Commitment Type: All

Include Revenue Accounts

Save Query as:  
 Shared  
Submit Query

[ Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer | Delete Finance Template ]

RELEASE: 8.7.0.2

# OneACCS

One System. All Access.

Below you will see an example of SSB8 Budget Query Output.

Employee Finance

Search: [ ] Go

MENU SITE MAP HELP EXIT  
Your current Institution is ACCSO

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**Report Parameters**

**Organization Budget Status Report**

By Account

Period Ending Sep 30, 2020

As of Jan 14, 2020

View Pending Documents  
Pending documents exist

Chart of Accounts	ACCSO Chart	Commitment Type
Fund	110100 System Office	Program
Organization	100110 Operations Division	Activity
Account	All	Location

**Query Results**

Account	Account Title	Adjusted Budget	Year to Date	Commitments	Available Balance
612000	Professional Salaries - SW	49,651.33	32,243.55	0.00	17,607.78
613000	Support Salaries - SW	96,605.95	33,187.00	0.00	63,418.95
618000	Longevity Pay - SW	2,720.00	3,100.00	0.00	(380.00)
620300	PICA - FB	11,179.59	5,196.07	0.00	5,983.52
620400	Group Health Insurance - FB	40,176.00	11,160.00	0.00	29,016.00
620700	Retirement - FB	18,176.54	5,640.83	0.00	12,535.71
715500	Registration Fees - OS	337.00	0.00	0.00	337.00
720300	Equipment - non-capitalized - MS	13,500.00	0.00	0.00	13,500.00
720500	Materials and Supplies - MS	1,250.00	114.54	0.00	1,135.46
730900	Insurance and Bonding - PS	54,040.00	58,527.00	0.00	(4,487.00)
731400	Other contractual Services - PS	11,201.85	26.62	0.00	11,175.03
731700	Professional Development - PS	90.00	0.00	0.00	90.00
740500	Landline Phones - UC	37,184.36	1,996.00	9,960.00	25,218.36
740700	Waste Disposal - UC	167.61	22.33	227.67	(82.39)
740800	Wireless Phones - UC	16,752.04	4,283.58	13,716.42	(1,247.96)
750600	Freight - OOS	150.18	0.00	0.00	150.18
750700	Gasoline & Oil - Motor Veh - OOS	25,939.22	5,915.16	31,084.92	(11,060.78)
751100	Maintenance & Repairs - OOS	15,480.48	1,738.57	1,724.26	12,417.65
751200	Postage - OOS	1,750.90	242.35	0.00	1,508.55
751300	Printing and Binding - OOS	1,340.67	0.00	0.00	1,340.67
751600	Short-Term Equipment Rentals - OOS	3,774.15	107.10	0.00	3,667.05
751800	Taxes and Licenses	145.50	0.00	0.00	145.50
791500	Lease Purchase - CE	1,123,939.52	27,516.60	55,033.20	1,041,389.72
791600	Long-Term Equipment Lease - CE	8,988.74	0.00	0.00	8,988.74
792300	Transportation Equip > \$25,000 - CE	260,247.50	0.00	0.00	260,247.50
	Report Total (of all records)	1,794,998.94	191,017.32	111,366.37	1,492,615.25

Another Query

[ Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document | Budget Transfer | Multiple Line Budget Transfer | Delete Finance Template ]

RELEASE: 8.7.0.2

## SSB9 Budget Query Process

SSB9 URL: <https://financesb-prod.ec.accs.edu/FinanceSelfService?mepCode=ACCSO>

## Banner 9 Finance Self-Service

To log into Finance Self-Service:

1. Enter the URL address for Banner Self-Service 9 (See URL above).
2. Enter your User ID and password in the corresponding fields, and click **Sign In**.

 ellucian.

Sign in to your account

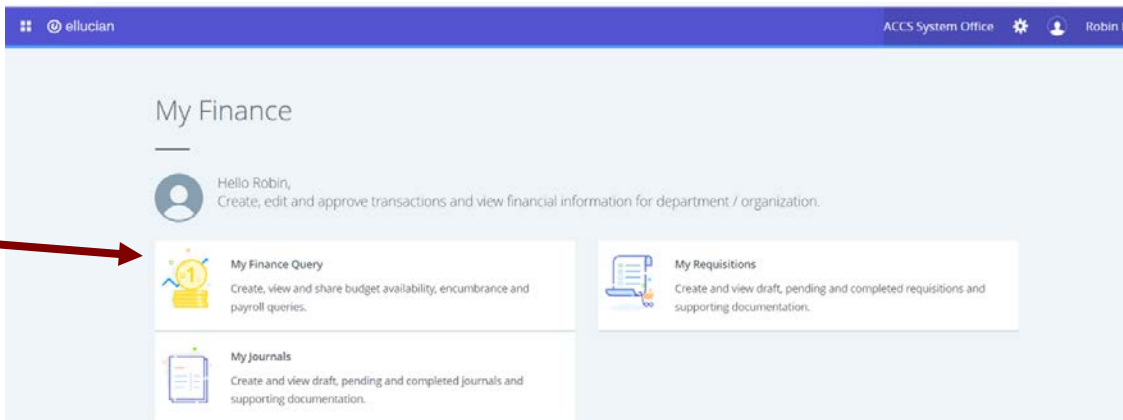
rhead@accs.edu

.....

Sign In

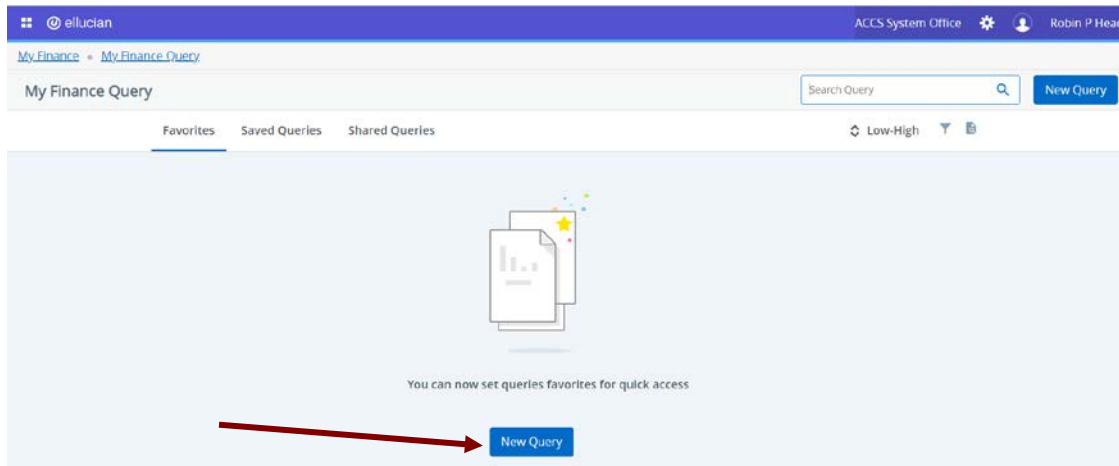
Remember me on this computer

3. From SSB9 Landing Page select **My Finance Query**.

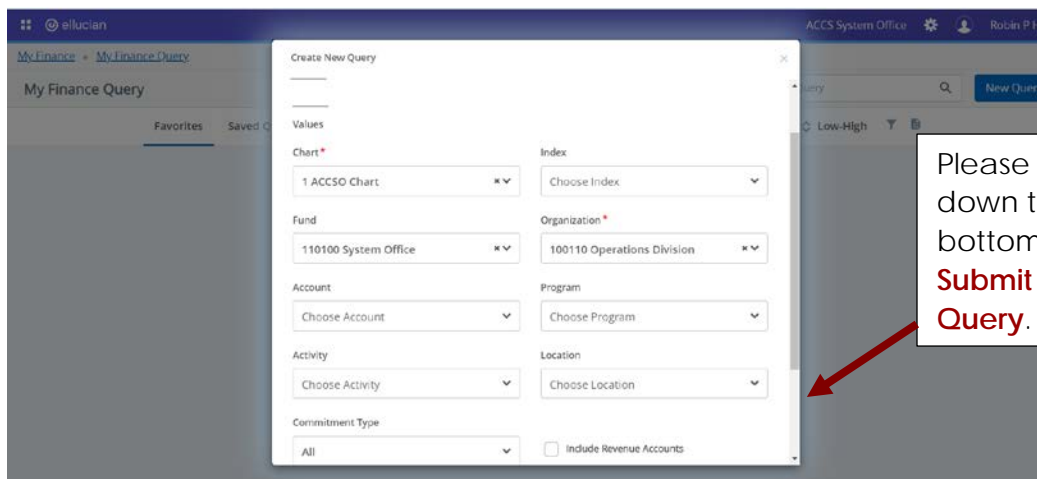


The screenshot shows the 'My Finance' dashboard in the ellucian system. The user is identified as Robin F. The dashboard includes a navigation bar at the top with the ellucian logo and 'ACCS System Office'. Below the navigation bar, the user's name and a brief description of their role are displayed. The main content area features three prominent sections: 'My Finance Query' (highlighted with a red arrow), 'My Requisitions', and 'My Journals'. Each section includes a brief description of its functionality.

4. Select **New Query**.



5. Enter your departmental Fund and Organization. Please refer to your handout for your department's frequently utilized accounts and **Submit Query**.



## SSB9 Budget Query Output

ellucian ACCS System Office Robin P Head

My Finance > My Finance Query > Budget Quick Query

Budget Quick Query New Query

< Operations Division - 100110

Query Results

Account	Account Title	Health	Adjusted Budget	Year to Date	Commitments	Available Balance
720300	Equipment - non capitalized - MS	✔	\$13,500.00	\$0.00	\$0.00	\$13,500.00
720500	Materials and Supplies - MS	✔	\$1,250.00	\$114.54	\$0.00	\$1,135.46
730900	Insurance and Bonding - PS	⚠	\$54,040.00	\$58,527.00	\$0.00	(\$4,487.00)
731400	Other Contractual Services - PS	✔	\$11,201.65	\$26.62	\$0.00	\$11,175.03
731700	Professional Development - PS	✔	\$90.00	\$0.00	\$0.00	\$90.00
740500	Landline Phones - UC	✔	\$37,194.36	\$1,996.00	\$9,980.00	\$25,218.36
740700	Waste Disposal - UC	⚠	\$167.61	\$22.33	\$227.67	(\$82.39)
<b>Report Total (of all records)</b>			<b>\$1,794,998.94</b>	<b>\$191,017.32</b>	<b>\$111,366.37</b>	<b>\$1,492,615.25</b>

Please scroll down to bottom to view complete document.

