

## Helpful Banner Finance Tips

1. When logging into Banner Finance Self-Service to perform a budget query, the desired fiscal year must be selected and the appropriate Chart of Accounts (either A or F-case sensitive) must be entered. Fiscal years run from July 1 through June 30, so if this is 2021-22, please select FY 2022.
2. If you encounter problems accessing your funds, please review the section entitled “Requesting Access to Funds for Self-Service and E-Print.” If you still have problems, please contact the appropriate following person(s) by e-mail:
  - Business Systems – [group-Business\\_Systems@appstate.edu](mailto:group-Business_Systems@appstate.edu) (All Funds)
  - Elaine Berry – [berryle@appstate.edu](mailto:berryle@appstate.edu) (Special Funds/Grants)
  - Clayton Christian – [christiancc@appstate.edu](mailto:christiancc@appstate.edu) (Foundation Funds)
3. The Banner Self-Service Budget Queries requires selection of “Accounted Budget” rather than “Adjusted Budget” to drill down on an item. You may click on any blue number/amount to get more detailed information.
4. Budget Pool information is found in the Quick Reference category of the Budget section under Administrative Policies and Procedures, as well as the departmental and multiple line budget transfer sections of this training manual.
5. Banner Finance Self-Service (online) budget transfers can be made between any of the budget pools listed (with the exception of the 614650 budget pool), but can only be made within an individual fund. (Example: the English Department may transfer between its’720000 and 750000, but cannot transfer from its’ 720000 to the Math Department’s 720000.)
6. The Banner Finance Self-Service (online) budget transfer rules require verification of fund availability before processing budget transfers (**movement of funds must be in whole dollar amounts**).
7. Do not attempt Banner Finance Self-Service (online) budget transfers until original budget allocations are posted.
8. Enter the index number (same as fund number) in the index field on all Banner Finance Self-Service entries so that organization and program fields will populate automatically.
9. Remember to press the command buttons using the mouse instead of pressing the enter key on the keyboard. This will insure proper execution of the entry.