

Banner Finance SSB Training

Budget Queries

Agenda

- Terminology
- SSB Queries
 - Demonstration
 - Goal – see how various transactions will look in SSB queries
 - Hands on SSB queries - basic data
 - Goal – gain an understanding of the queries
 - Hands on SSB queries – more complex data
 - Goal – gain an understanding of the data
- Homework

Terminology

- FRS
 - **Encumbrance** = Funds committed based on a Requisition or PO
- Banner Finance
 - **Reservation** = Funds committed based on a Requisition
 - **Encumbrance** = Funds committed based on a PO or general encumbrance
 - **Commitment** = Reservations + encumbrances

Terminology

- Queries
 - Refers to the SSB online tools that allow to check your Banner Finance data real time
 - Improvement from FRS
 - Think FRS online screens with “Drill Downs”
- Reports
 - Refers to reports written by the University and executed outside the system
 - Improvement from FRS
 - These reports will be near real-time
 - Think e~Print Daily

Query types

- Types of Queries
 - Budgets
 - FRS screens 19, 22, etc.
 - SSB – Budget queries (3 versions)
 - Encumbrances
 - FRS screens 21 & 26
 - SSB - Encumbrance query
 - Document
 - 25x (reqs), 22x(POs), 118 (invoices)
 - SSB – View doc