

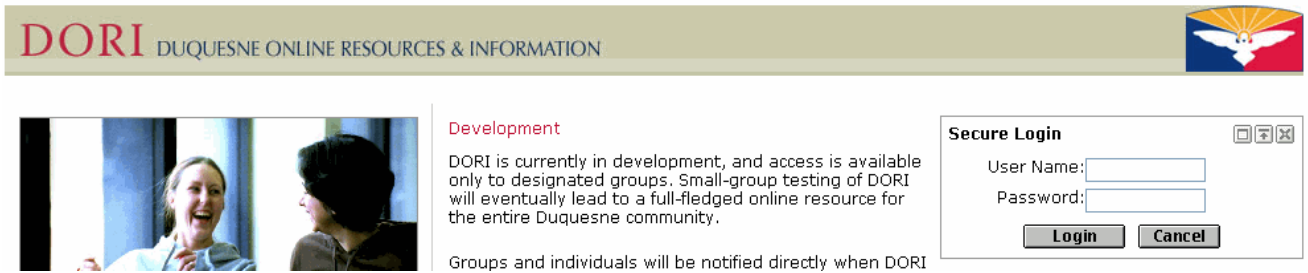


Banner Training Manual

Budget Development: Viewing FY10 Financial Aid Operating Budgets

1. Login to DORI

- Visit the DORI portal at <https://dorinew.cr.duq.edu/cp/home/displaylogin>
- Enter your username and password in the boxes provided



The screenshot shows the top of the DORI portal. On the left, there is a header with the text "DORI DUQUESNE ONLINE RESOURCES & INFORMATION" and a logo on the right featuring a white dove with wings spread against a red and blue background. Below the header, there is a "Development" section with a small image of two people talking. The text in this section states: "DORI is currently in development, and access is available only to designated groups. Small-group testing of DORI will eventually lead to a full-fledged online resource for the entire Duquesne community." Below this text, it says "Groups and individuals will be notified directly when DORI". To the right of the development section is a "Secure Login" box with fields for "User Name:" and "Password:", and "Login" and "Cancel" buttons.

If you have problems logging on contact the Help Desk at ext. 4357.

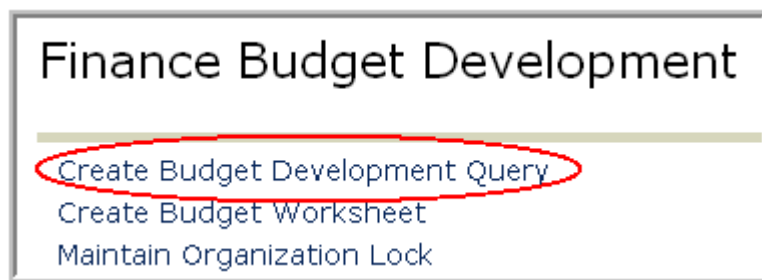
2. Navigate to Budget Development

1. Click on Self Service Banner
2. Click on Finance
3. Click on Budget Development



The screenshot shows the navigation menu of the DORI portal. The menu items are: Home, Help, Self Service Banner, Registration Information, Staff, Personal Information, Student Information, Employee, and Finance. The "Self Service Banner" and "Finance" items are circled in red. Below the menu is a search box with a "Go" button. Under the "Finance" section, there is a list of links: Budget Queries, Encumbrance Query, View Document, and Budget Development. The "Budget Development" link is circled in red.

3. Click on Create Budget Development Query



The screenshot shows the "Finance Budget Development" page. The page title is "Finance Budget Development". Below the title, there is a list of links: Create Budget Development Query, Create Budget Worksheet, and Maintain Organization Lock. The "Create Budget Development Query" link is circled in red.

4. Click on Create Query.

Budget Development Query

i To create a new query, select Create Query. To retrieve

Create a New Budget Query

Retrieve Existing Budget Query
Saved Query

5. Click on Line Item Detail and then Continue.

You do not need to click on any of the other checkboxes to retrieve your financial aid budget.

Budget Development Query

i Select the columns to display on the report. Inc

<input type="checkbox"/> Adopted Budget
<input type="checkbox"/> Permanent Budget Adjustments
<input type="checkbox"/> Temporary Adopted
<input type="checkbox"/> Temporary Adjustments
<input type="checkbox"/> Base Budget and Cumulative Change
<input type="checkbox"/> Lock Status
<input type="radio"/> Organization Hierarchy <input checked="" type="radio"/> Line Item Detail

6. The following information needs to be input on the next screen.

- Chart of Accounts = 1
- Budget ID = FY2010
- Budget Phase = FINAID
- Fund = 110010
- Organization = 6 digit Organization Code
- Index, Account, Program, Activity and Location can be left blank
- Budget Duration Code = All
- Display Fin Mgr from = Fund
- Check to Include: Revenue
- Do not Save the Query or check the Shared query checkbox
- Click on Submit

Budget Development Query


 Chart, Budget ID, and Phase are required for Line Item Detail Query. Fund, Organ Location null matches null, % means All, or wildcard (%) may be used. Choose Budget the query.

Chart of Accounts	<input type="text" value="1"/>	Budget Phase	<input type="text" value="FINAID"/>	<input type="button" value="Budget"/>
Budget ID	<input type="text" value="FY2010"/>	Program	<input type="text"/>	
Index	<input type="text"/>	Activity	<input type="text" value="%"/>	
Fund	<input type="text" value="110010"/>	Location	<input type="text" value="%"/>	
Organization	<input type="text" value="450010"/>			
Account	<input type="text"/>			

Budget Duration Code:

Display Fin Mgr from:

Check to Include:


<input checked="" type="checkbox"/> Revenue Accounts
<input type="checkbox"/> Labor Accounts
<input type="checkbox"/> Expenses
<input type="checkbox"/> Transfers

Save Query as:

Shared

7. The next screen shows the query results for your FY10 financial aid budget. The financial aid budget is located on the row entitled Report Total in the Proposed Budget column and is circled in red on the diagram below.

Budget Development Query

 Select Proposed amount if enabled as link to access history for this budget line. Select View link if present to review text for this options to download Budget Development data to a spreadsheet.

Report Parameters

Budget Development Report					
Line Item Detail					
Chart of Accounts 1	Duquesne University		Duration	All	
Budget Id	FY2010	Fiscal Year 2010	Budget Phase	FINAID	FY10 Financial Aid
Fund	110010	Current Operations	Program	All	
Organization	450010	Planning & Budget	Activity	All	
Account	All		Location	All	

Query Results

Fund	Program	Account	Activity	Location	Duration	FY2010 /FINAID	Proposed Budget	Text	Origin	Financial Manager
110010	140010	521470			P		(2,598.51)			Not Specified
Report Total (of all records)							(2,598.51)			

Shared

8. It is recommended that you either write down the amount of the Proposed Budget or print this page for your records, however, you will be able to query this information again.