Accessing and Viewing Your Budget

Self Service Banner's **My Finance Query** (MFQ) is the tool for budget managers to view budget and expense detail. Find our instructional video here: https://youtu.be/GYrJ_jgb09Q

Accessing My Finance Query

Navigate to bardssb.bard.edu and log in using your Bard College credentials.

In the Finance tab, enter the My Finance Query portal to view an overview tile for each budget you manage. Click on the desired query tile to open the report view.

Viewing a Budget

Adding a New Budget Tile

Add a new budget tile when you have received access to a new department budget OR when you want to add an additional view of the same budget with a different year.

While logged in to My Finance Query, complete the following:

1. Select "Shared Queries" and click on the query named "Budget Status by Account" (if there are no fields filled, close and reopen the query).
2. In the pop-up panel, click the Organization box and type/select the desired accessible org.
3. Scroll to the bottom of the panel and click Submit.
4. Click the Save As button (floppy disk silhouette), name the query per accepted naming convention, check "Set as favorite" and click save.
5. (Optional) If you wish to create more tiles, click the back arrow next to the name of the current query and resume at step 2.

Modifying an Existing Budget Tile

Modify an existing budget tile when you want to update an existing budget tile to show a different fiscal year.

While logged in to My Finance Query, complete the following:

1. Click the budget tile you want to update.
2. Click the Edit Query button (pencil silhouette) to the right of the query name.
3. In the pop-up panel, scroll down to Fiscal Year and click the drop-down to select the desired year.
4. Scroll to the bottom of the panel and click Submit.
5. Click the Save As button (floppy disk silhouette), confirm the name/favorite checkmark and click save.

Removing a Budget Tile

Remove a budget tile when you no longer want to view the tile. This does not remove access to the department budget; it can be added to the dashboard at any time.

If you do not want to see the tile in Favorites on the front page, but still want the tile saved, click the star silhouette on the desired budget tile. You can re-favorite the tile under Saved Queries.

If you do not want to see the tile in your account, click the trash bin silhouette on the desired budget tile.