

Budget Queries

- Select Finance from the main menu



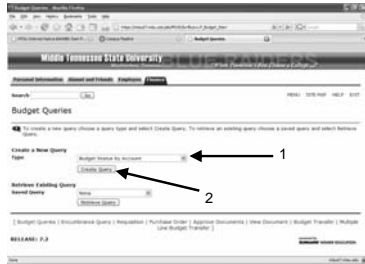
Budget Queries

- Select Budget Queries



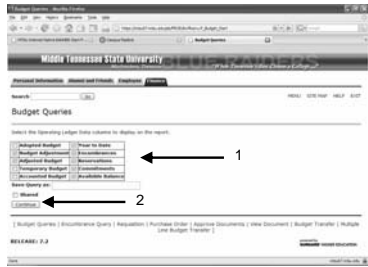
Budget Queries

- Select Budget Status by Account



Budget Queries

- Select data columns to appear



Budget Queries

- Data columns represent
 - Adjusted Budget: current budget
 - Year to Date: transactions to date
 - Encumbrances: PO's processed
 - Reservations: requisitions outstanding
 - Commitments: encumbrances+reservations
 - Available Balance: budget less other columns

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Budget Queries

- Enter appropriate parameters
- Click Submit Query button twice



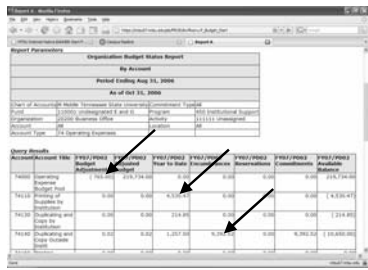
Budget Queries

- Parameters
 - Fiscal Year: desired fiscal year
 - Fiscal Period: 01 = July, 02=August, etc.
 - Chart: M for University, F for Foundation
 - Index: 6 digit shortcut to Banner FOAPAL
 - Grant: = Fund; only needed for grants
 - Account: used to refine report
- May optionally specify comparison year

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Budget Queries

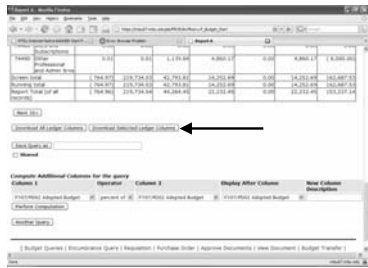
- Final report screen
- Click any blue number for further detail



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Downloading to Excel

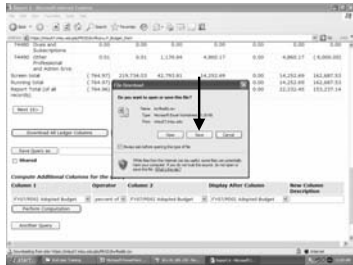
- Click Download Selected Ledger Columns



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Downloading to Excel

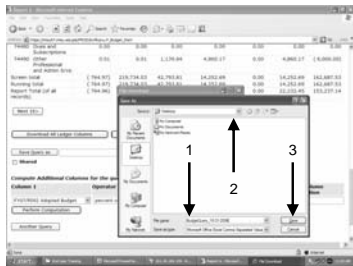
- Click Save to download file



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Downloading to Excel

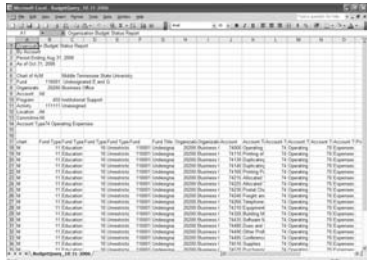
- Name the file, select location, click Save



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Downloading to Excel

- File automatically opens in Excel



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Navigation

- Click Menu at top right for Main Menu



Encumbrance Queries

- Select Encumbrance Query



Encumbrance Queries

- Enter appropriate parameters
- Click Submit Query button twice