How to view a summarized budget

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The FGIBSUM form

The **FGIBSUM** query shows summarized budget information by Account type (Revenue, Labour, and Direct Expenditures) for a selected Fund. As an Operating Ledger query, only posted documents are included.

Field definitions

	Item	Description
1	**Chart of Accounts** **(Required)**	Chart of Accounts code. McGill University's set of books is represented by the number 1.
2	**Fiscal Year** **(Required)**	Represents the University's fiscal year from June 1st to May 31st (Example: 00 represents the fiscal year ending May 31st, 2000. The fiscal year field defaults to the current fiscal year but it can be overridden.
3	**Organization**	Organization code. Represents the Departmental entities or budgetary unit responsible for the transaction.
4	**Fund** **(Required)**	Fund code. Represents the source of money and how it must be used.
5	**Commit Indicator**	Commit Indicator. **Both** - Displays both committed and uncommitted records. **Committed** - Displays committed records only. **Uncommitted** - Displays uncommitted records only.
6	**Account Type**	Description of high level ACCOUNT type: Revenue, Labour, Expense, Direct Expenditures.
7	**Adj Budget**	Adjusted budget. Total budget for the year. It combines the adopted budget (original allocation given at the beginning of the year) and any budget adjustments (adjustments made to adopted budget throughout the year, supplementary amounts).
8	**YTD Activity**	Year-to-date activity. Represents actual revenue and expenditures posted.
9	**Commitments**	Commitments equal to the total budget set aside for future obligations. Commitments are made up reservations (generated by purchase requisitions) and encumbrances (generated by purchase orders and appointment forms).
10	**Available Bal**	The available balance is the adjusted budget, plus or minus the actuals, plus or minus the commitments.
11	**Net**	Represents the totals by adjusted budget and YTD actual columns.
12	**Total Commitments**	Total of the commitment column.

How to cancel a purchase requisition

Before you start   You cannot view the information on FGIBSUM unless you have security access to view the fund. To obtain access, fill out the **Banner Finance Information System Application/Authorization** and have it signed by the appropriate Fund Holder(s).

Querying   1   Type **FGIBSUM** in the **Go** field on the **Main Menu** and hit enter.

2   Tab to the **Fund** field and enter your Fund code.

3   Click on the **Next Block** icon or use Ctrl-Page Down if you prefer using your keyboard.

4   The **Adj Budget** column represents your total budget for the year.

5   The **YTD Activity** column represents the Actual revenue and expenditures posted to your fund.

6   The **Commitments** column represents the total budget set aside for future obligations. It includes reservations and encumbrances.

7   The **Available Balance** column represents what you have left to spend.

8   To perform a new search, click on the **Rollback** icon to return to the key block.