

Web for Finance – Budget Quick Query

This form will provided you with simplified access to the current status of a budget and displays information similar to that available on the Organization Budget Status Form (FGIBDST). It includes budgets, actual activity, commitments, and available balance amounts.

NOTE: There is no drill down feature available. To get the details, use the Type “Budget Status by Account”

1. Access the Minerva web site at <http://www.is.mcgill.ca/minerva>
2. Click on **Enter Secure Site**
3. Enter your **McGill ID** (*Example: 150999999*)
4. Enter your **Pin** (if you do not know your Pin, click on the **Forgot Pin?** button, answer the **Authentication Question**, and enter in a new **Pin** number).
5. Click on **McGill Fund Administration Menu**.

How to use Budget Queries – “Budget Quick Query”

6. Click on **Budget Queries**.
7. In the section “Create a New Query”, Select **Budget Quick Query** from the drop down list.
8. Click on **Create Query**.
9. Enter the Values (**Fund, Org, etc...**). **TIP: To ensure you have all transactions, use % in the Org field.**
NOTE: If your Fund is associated to a Grant, you must specify both the Fund and Grant codes for grant inception-to-date reporting. If your Fund is not associated to a Grant, you must specify both your Fund and Org codes
10. Click on **Submit Query**.

Report Parameters

**Organization Budget Status Report
By Account
Period Ending May 31, 2003
As of Jan 20, 2003**

Chart of Accounts	McGill University	Commitment Type	All
Fund	159332 Accounting Consultants	Program	All
Organization	%	Activity	All
Account	All	Location	All

Query Results

Organization	Organization Title	Account	Account Title	Adjusted Budget Year to Date	Commitments	Available Balance
00346	Accounting Department	700421	Previous Year Balance Forward	0.00	0.00	0.00
Report Total (of all records)				0.00	0.00	0.00

Another Query

[Budget query for Fund Holders | Budget Queries | Encumbrance Query | Requisition | PCard-MOPS | Approve Documents | View Document | Purchase Order | Multiple Line Budget Transfer | Budget Transfer | Invoice Copies]

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What do the dollar columns mean?

11. The **Adjusted Budget** column represents your **Total Budget** for the year.
12. The **Year to Date** column represents the **Actual** revenue and expenditures posted to your fund.
13. The **Commitments** column represents money set aside for **Salaries and Purchase Orders and Purchase Requisitions.**
14. The **Available Balance** column represents what you have **Left** to spend.

What do the total fields mean?

15. The **Screen Total** represents the **Total** of the records on the screen you are viewing.
16. The **Running Total** represents the cumulative **Total** of records up to and including the current screen.
17. The **Report Total** represents the **Bottom-Line Total** of all records for your fund.
18. Click on the **Next 15 button** to scroll through the next 15 records.

For **MORE INFORMATION** on this form see the Finance “How –To” at
<http://www.is.mcgill.ca/minerva>