Web Product

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"

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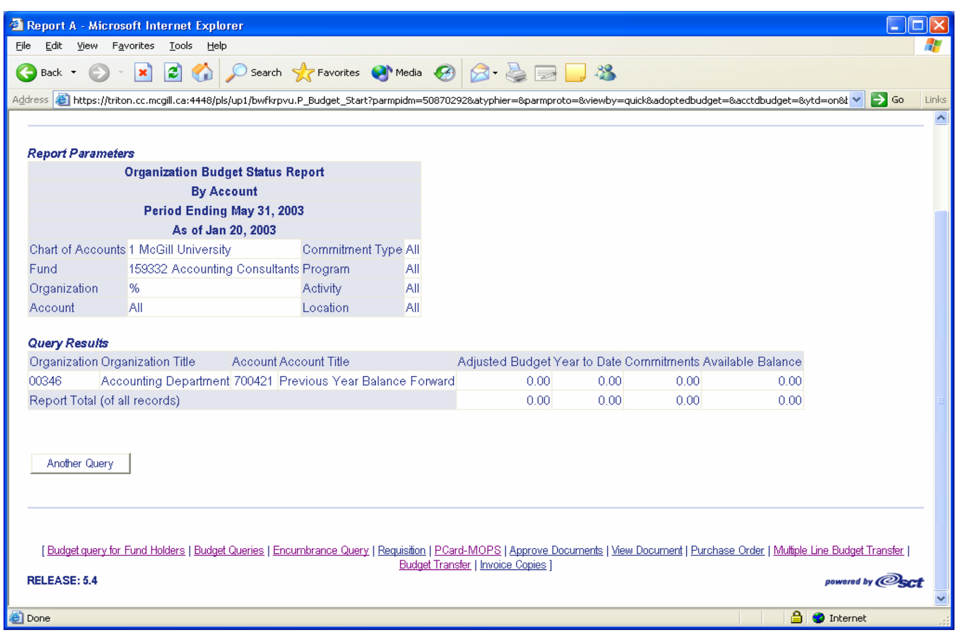
1. **Access** the **Minerva** web site at http://www.is.mcgill.ca/minerva
2. Click on **Enter Secure Site**
3. Enter your **McGill ID** (Example: ***150999999***)
4. Enter your **Pin** (if you do not know your Pin, click on the **Forgot Pin?** button, answer the **Authentication Question**, and enter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



Created by: Karen Kirouac, Training and Communications Officer, Accounting department

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