Self-Service Banner:
Inception to Date Budget Balance
Budget Queries – Project to Date Balances

Budget Queries

To create a new query choose a query type and select Create Query.

Create a New Query
Type

Budget Status by Account
Create Query

Retrieve Existing Query
Saved Query
None
Retrieve Query

Budget Status By Account

• Choose Budget Status by Account.

• Follow Steps 1 – 6 as defined on the next page.
Budget Queries – Project to Date Balances

- Step 1 – Fiscal Year [*enter current fiscal year] and Fiscal Period 14
- Step 2 – Enter Chart 1 and Index 999800
- Step 3 – Click Submit Query, See Fund, Org, Program get populated
- Step 4 – Enter Grant Code, HINT: If research grant usually it’s the letter “G” and the Fund
Budget Queries – Project to Date Balances

Grant Codes

- The grant code is the fund code with the corresponding letters in front as shown below. The only situations where this may not be the case is if there are many projects under one grant.

<table>
<thead>
<tr>
<th>First Letter of Grant Code</th>
<th>Type of Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>G</td>
<td>Grant</td>
</tr>
<tr>
<td>R</td>
<td>Restricted</td>
</tr>
<tr>
<td>P</td>
<td>Plant Fund</td>
</tr>
<tr>
<td>A</td>
<td>Agency</td>
</tr>
<tr>
<td>D</td>
<td>Designated</td>
</tr>
</tbody>
</table>
Budget Queries – Project to Date Balances

- You must enter the grant code to access project to date information. Once entered select Submit Query.
Budget Queries – Project to Date Balances

- This is the results of your query. All information is tracked on an inception to date basis.
- **REMEMBER** – The Grant Code is what allows finance to track projects inception to date. If not included in query you will only view fiscal year to date.