

## Instructions for using Budget Queries in Self Service

There are two report queries that can be run in self service. They are **Budget Summary** and **Budget Detail**. Follow the steps below to access the reports:

- 1) Log On to JagNet and locate the **Employee** Tab.
- 2) Click on **Faculty Self Service**.
- 3) Click on **Finance** Link.
- 4) Click on **Budget Queries**.

### Budget Summary

The screenshot shows a Microsoft Internet Explorer browser window displaying the SunGard Higher Education web application. The browser's address bar shows the URL: `http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP_tparam=utf&utf=/cp/school/sctmain`. The application's navigation menu includes "Personal Information", "Employee", "WebTailor Administration", and "Finance". The "Finance" tab is active, and the "Budget Queries" page is displayed. The page features a search bar, a "MENU SITE MAP HELP" link, and a "Create a New Query" section with a dropdown menu showing options: "Budget Status by Organizational Hierarchy", "Budget Status by Account", "Budget Status by Organizational Hierarchy", and "Budget Quick Query". Below this is a "Retrieve Existing Query" section with a "Saved Query" dropdown set to "None" and a "Retrieve Query" button. At the bottom, there is a "RELEASE: 7.2" label, a navigation menu with links like "[ Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Development | Delete Finance Template ]", and the SunGard Higher Education logo with the text "powered by SUNGARD HIGHER EDUCATION".

- 1) For a general view of the budget by Organization and Fund, select **Budget Status by Organizational Hierarchy** from the drop-down list by **Create a new Query Type**. Hit the **Create Query** button.

The screenshot shows a Microsoft Internet Explorer browser window displaying the SunGard Higher Education web application. The address bar shows the URL: [http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP\\_tparam=utf&utf=/cp/school/sctmain](http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP_tparam=utf&utf=/cp/school/sctmain). The page title is "SunGard Higher Education - Microsoft Internet Explorer".

The application interface includes a navigation menu with tabs for "Personal Information", "Employee", "WebTailor Administration", and "Finance". The "Finance" tab is currently selected. A search bar is located at the top left, and navigation links for "MENU", "SITE MAP", and "HELP" are at the top right.

The main content area is titled "Budget Queries" and contains an information icon and the instruction: "Select the Operating Ledger Data columns to display on the report." Below this, there is a list of checkboxes for selecting data columns:

<input checked="" type="checkbox"/> Adopted Budget	<input checked="" type="checkbox"/> Fiscal YTD Activity
<input checked="" type="checkbox"/> Budget Adjustment	<input checked="" type="checkbox"/> Encumbrances
<input checked="" type="checkbox"/> Adjusted Budget	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/> Commitments
<input type="checkbox"/>	<input checked="" type="checkbox"/> Available Balance

Below the checkboxes, there is a "Save Query as:" text box, a "Shared" checkbox, and a "Continue" button.

At the bottom of the page, there is a navigation bar with links: [ [Budget Queries](#) | [Encumbrance Query](#) | [Approve Documents](#) | [View Document](#) | [Budget Development](#) | [Delete Finance Template](#) ]. The text "RELEASE: 7.2" is on the left, and "powered by SUNGARD HIGHER EDUCATION" is on the right.

- 2) Select the columns you want to display. You generally want to view the following columns in the Summary: **Adopted Budget, YTD Activity, Budget Adjustment, Adjusted Budget, Encumbrances, Commitments, and Available Balance**. Click **Continue**.

SunGard Higher Education - Microsoft Internet Explorer

Address: http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP\_tparam=uf&utf=/cp/school/sctmain

Back to My JagNet Tab

Calendar Groups Logout Help

Personal Information Employee WebTailor Administration **Finance**

Search  Go MENU SITE MAP HELP

## Budget Queries

**i** For a Budget Query to be successful, a user with Fund Organization query access must enter a value in either the Organization or Grant fields as well as the Fiscal Year, Period, and Chart of Accounts fields. If Grant information is queried, all retrieved information is Grant Inception to Date. Otherwise, all information retrieved is through the Fiscal Year to Date.

**i** To perform a comparison query select a Comparison Fiscal Year and Period in addition to the required Fiscal Year and Period. With this selection, all details retrieved will be placed next to the corresponding comparison fiscal period.

Fiscal year: 2009 Fiscal period: 14

Comparison Fiscal year: None Comparison Fiscal period: None

Commitment Type: All

COAS: S Submit Query

Fund: 110000 Submit Query

Organization: 410013

Grant: Fund Type

Account: Account Type

Program:

Include Revenue Accounts

Save Query as:

Shared

Submit Query

[ Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Development | Delete Finance Template ]

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Done Internet

- 3) Select the following parameters for the Query:
  - a) Select a **Fiscal Year** from the drop down.
  - b) Select a **Fiscal Period**. For current budget, select **14**.
  - c) Under **COAS** select **S**.
  - d) Select a **Fund**.
  - e) Select the **Organization** for which you want to see budget detail
- 4) Click **Submit Query**.

## Budget Detail View

Screenshot of a web browser displaying the SunGard Higher Education Budget Detail View. The browser window title is "SunGard Higher Education - Microsoft Internet Explorer". The address bar shows the URL: [http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP\\_tparam=utf&utf=/cp/school/sctmain](http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP_tparam=utf&utf=/cp/school/sctmain).

The page content includes a navigation menu with tabs for "Personal Information", "Employee", "WebTailor Administration", and "Finance". A search bar is located at the top left, and a "Go" button is next to it. On the right side, there are links for "MENU", "SITE MAP", and "HELP".

The main heading is "Budget Queries". Below this, there is an information icon and a message: "To create a new query choose a query type and select Create Query. To retrieve an existing query choose a saved query and select Retrieve Query."

The "Create a New Query" section has a "Type" dropdown menu with the following options: "Budget Status by Account", "Budget Status by Account", "Budget Status by Organizational Hierarchy", and "Budget Quick Query".

The "Retrieve Existing Query" section has a "Saved Query" dropdown menu with the option "None" and a "Retrieve Query" button.

At the bottom of the page, there is a navigation bar with links: "[ Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Development | Delete Finance Template ]". The version number "RELEASE: 7.2" is displayed on the left, and the SunGard Higher Education logo is on the right.

- 1) For a view of the budget summary by Org and Fund, select **Budget Status by Account** from the drop-down list by **Create a new Query Type**. Hit the **Create Query** button.

The screenshot shows a web browser window titled "SunGard Higher Education - Microsoft Internet Explorer". The address bar contains the URL: [http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP\\_tparam=utf&utf=/cp/school/sctmain](http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP_tparam=utf&utf=/cp/school/sctmain). The page has a green header with navigation links: "Back to My JagNet Tab", "Calendar", "Groups", "Logout", and "Help". Below the header is a navigation menu with "Personal Information", "Employee", "WebTailor Administration", and "Finance" (which is highlighted). A search bar is present with a "Go" button. The main content area is titled "Budget Queries" and includes an information icon and the instruction: "Select the Operating Ledger Data columns to display on the report." Below this is a list of checkboxes for column selection:

<input checked="" type="checkbox"/> Adopted Budget	<input checked="" type="checkbox"/> Fiscal YTD Activity
<input checked="" type="checkbox"/> Budget Adjustment	<input checked="" type="checkbox"/> Encumbrances
<input checked="" type="checkbox"/> Adjusted Budget	<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/> Commitments
<input type="checkbox"/>	<input checked="" type="checkbox"/> Available Balance

Below the checkboxes is a "Save Query as:" text box, a "Shared" checkbox, and a "Continue" button. At the bottom of the page, there is a navigation breadcrumb: "[ Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Development | Delete Finance Template ]". The footer includes "RELEASE: 7.2" and "powered by SUNGARD HIGHER EDUCATION".

- 2) Select the columns you want to display. You generally want to view the following columns in the Summary: **Adopted Budget, YTD Activity, Budget Adjustment, Adjusted Budget, Encumbrances, Commitments, and Available Balance.**

SunGard Higher Education - Microsoft Internet Explorer

Address: http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP\_tparam=utf&utf=/cp/school/sctmain

Back to My JagNet Tab

Calendar Groups Logout Help

Personal Information Employee WebTailor Administration **Finance**

Search  Go MENU SITE MAP HELP

## Budget Queries

Fiscal year: 2009 Fiscal period: 14

Comparison Fiscal year: None Comparison Fiscal period: None

Commitment Type: All

COAS: S Submit Query

Fund: 110000 Submit Query

Organization: 410013

Grant: Fund Type

Account: Account Type

Program:

Include Revenue Accounts

Save Query as:

Shared

Submit Query

[ Budget Queries | Encumbrance Query | Approve Documents | View Document | Budget Development | Delete Finance Template ]

RELEASE: 7.2

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Done Internet

- 3) Select the following parameters for the Query:
  - b) Select a Fiscal Year for the **FY**.
  - b) Select a **Fiscal Period**. For current budget, select **14**.
  - d) Under **COAS** select **S**.
  - d) Select a **Fund**.
  - f) Select the **Organization** for which you want to see budget detail
- 4) Click **Submit Query**.

SunGard Higher Education - Microsoft Internet Explorer

Address: http://jagnet4.southtexascollege.edu/cp/render.UserLayoutRootNode.uP?uP\_tparam=utf&utf=/cp/school/sctmain

Back to My JagNet Tab

Calendar Groups Logout Help

Fund 110000 General Funds - Program All  
 Organization 410013 Business Office All  
 Account All All

**Query Results**

Account	Account Title	FY09/PD14 Adopted Budget	FY09/PD14 Budget Adjustment	FY09/PD14 Adjusted Budget	FY09/PD14 Fiscal YTD Activity	FY09/PD14 Encumbrances	FY09/PD14 Commitments	FY09/PD14 Available Balance
610043	Stipends - Cell Phone	0.00	240.00	240.00	160.00	80.00	80.00	0.00
610060	Administrative Staff	153,981.00	0.00	153,981.00	75,394.20	15,078.84	15,078.84	63,507.96
610070	Professional/Technical Support	701,355.00	5,535.69	706,890.69	545,178.20	125,405.68	125,405.68	36,306.81
610080	Classified	510,068.00	9,217.80	519,285.80	477,584.62	88,518.54	88,518.54	( 46,817.36)
610085	Overtime Pool	0.00	0.00	0.00	67,163.66	0.00	0.00	( 67,163.66)
610100	Student Direct Wage	0.00	7,663.87	7,663.87	7,840.25	6,759.50	6,759.50	( 6,935.88)
610110	Non-Student Direct Wage	0.00	0.00	0.00	1,740.91	8,059.40	8,059.40	( 9,800.31)
620000	Benefits	402,793.00	0.00	402,793.00	0.00	0.00	0.00	402,793.00
621016	Insur-STC Contribution	0.00	0.00	0.00	166,577.44	0.00	0.00	( 166,577.44)
621019	Insur-SKIP State Contribution	0.00	0.00	0.00	1,498.35	0.00	0.00	( 1,498.35)
621020	Insur-SKIP	0.00	0.00	0.00	0.00	0.00	0.00	0.00
622002	Employer Share FICA	0.00	0.00	0.00	87,445.08	0.00	0.00	( 87,445.08)
623004	ORP 6.00	0.00	0.00	0.00	6,408.50	0.00	0.00	( 6,408.50)
624002	TRS Benefit	0.00	0.00	0.00	71,411.42	0.00	0.00	( 71,411.42)
625002	Unemployment Compensation	0.00	0.00	0.00	6,785.00	0.00	0.00	( 6,785.00)
Screen total		1,768,197.00	22,657.36	1,790,854.36	1,515,187.63	243,901.96	243,901.96	31,764.77
Running total		1,768,197.00	22,657.36	1,790,854.36	1,515,187.63	243,901.96	243,901.96	31,764.77
Report Total (of all records)		2,165,197.00	98,336.36	2,263,533.36	1,813,749.40	304,093.73	358,293.73	91,490.23

Next 15>

Download All Ledger Columns Download Selected Ledger Columns

Save Query as

Shared

5) You will come to this page after you submit the query. You may click on any amount in blue to drill-down further.

**Important Note:** When beginning a new query, if you drilled into a previous query, the **Account** field will show a value. You must clear this field before you continue otherwise your query will not return a value. Delete the value and then hit the **Account** Button, and **Exit without a value**. Then hit **Submit Query**.