

SunGard Higher Education - Windows Internet Explorer

https://myportal.mtsac.edu/render.UserLayoutRootNc

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## Budget Queries

A01427960 Donna E. Burns  
Oct 26, 2011 03:39 pm

**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 through the Fiscal Year 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.

<b>Fiscal year:</b>	<input type="text" value="2011"/>	<b>Fiscal period:</b>	<input type="text" value="03"/>
<b>Comparison Fiscal year:</b>	<input type="text" value="None"/>	<b>Comparison Fiscal period:</b>	<input type="text" value="None"/>
<b>Commitment Type:</b>	<input type="text" value="All"/>		
<input type="button" value="Chart of Accounts"/>	<input type="text" value="M"/>	<input type="button" value="Index"/>	<input type="text"/>
<input type="button" value="Fund"/>	<input type="text" value="11000"/>	<input type="button" value="Activity"/>	<input type="text"/>
<input type="button" value="Organization"/>	<input type="text" value="410000"/>	<input type="button" value="Location"/>	<input type="text"/>
<input type="button" value="Grant"/>	<input type="text"/>	<input type="button" value="Fund Type"/>	<input type="text"/>
<input type="button" value="Account"/>	<input type="text" value="111000"/>	<input type="button" value="Account Type"/>	<input type="text"/>
<input type="button" value="Program"/>	<input type="text"/>		

**Include Revenue Accounts**

Save Query as:

**Shared**

Done Internet | Protected Mode: On

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Oct 26, 2011 03:37 pm

Select a link from an amount column in the Query Results list to retrieve detail information for the specific item chosen. Select one of the Download options to download Budget Query data to a Microsoft Excel spreadsheet. Calculate user defined columns for the query by making selections from the Compute Additional Columns pull down lists.

**Report Parameters**

**Organization Budget Status Report**

By Account

Period Ending Sep 30, 2010

As of Oct 26, 2011

Chart of Accounts	M Mt San Antonio College	Commitment Type	All
Fund	11000 Unrestricted General Fund-Ongoing Program		All
Organization	410000 Non Credit Adult Education	Activity	All
Account	All	Location	All

**Query Results**

Account	Account Title	FY11/PD03 Adjusted Budget	FY11/PD03 Year to Date	FY11/PD03 Commitments	FY11/PD03 Available Balance
111000	Instructional Salaries-Regular	102,211.00	18,583.64	0.00	83,627.36
121000	Educational Admin-Regular	141,816.00	35,454.00	0.00	106,362.00
129000	Noninstr Sal-Other	0.00	0.00	0.00	0.00
132000	Hrly Instr Sal-Ad Ed Reg Sch	100,000.00	4,572.17	0.00	95,427.83
132300	Hrly Instr Sal-Adult Ed	47,780.00	5,969.88	0.00	41,810.12

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A01427960 Donna E. Burns  
Oct 26, 2011 03:38 pm

**Report Parameters**

**Organization Budget Status Detail Report**  
**Summary Year to Date Transaction Report**  
**Period Ending Sep 30, 2010**  
**As of Oct 26, 2011**

Chart of Accounts: M Mt San Antonio College      Commitment Type: All  
 Fund: 11000 Unrestricted General Fund-Ongoing Program: All  
 Organization: 410000 Non Credit Adult Education      Activity: All  
 Account: 111000 Instructional Salaries-Regular      Location: All

**Document List**

Transaction Date	Activity Date	Document Code	Vendor/Transaction Description	Amount	Rule Class Code
Sep 30, 2010	Sep 29, 2010	F0002241	HR Payroll 2010 M1 9 0	9,291.82	HGRS
Aug 31, 2010	Aug 27, 2010	F0002057	HR Payroll 2010 M1 8 0	9,291.82	HGRS
Report Total (of all records):				18,583.64	

Available Budget Balance: 83,627.36

Save Query as:

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Sample Budget Query via Portal

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## Finance

A01427960 Donna E. Burns  
Dec 16, 2011 11:06 am

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**RELEASE: 8.3**

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# Sample Budget Query via Portal

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## Budget Queries

A01427960 Donna E. Burns  
Dec 16, 2011 11:03 am

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.

**Create a New Query**

Type

**Retrieve Existing Query**

Saved Query

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RELEASE: 8.3

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# Sample Budget Query via Portal

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A01427960 Donna E. Burns  
Dec 16, 2011 11:04 am

## Budget Queries

Select the Operating Ledger Data columns to display on the report.

<input type="checkbox"/> Adopted Budget	<input checked="" type="checkbox"/> Year to Date
<input type="checkbox"/> Budget Adjustment	<input type="checkbox"/> Encumbrances
<input checked="" type="checkbox"/> Adjusted Budget	<input type="checkbox"/> Reservations
<input type="checkbox"/> Temporary Budget	<input checked="" type="checkbox"/> Commitments
<input type="checkbox"/> Accounted Budget	<input checked="" type="checkbox"/> Available Balance

Save Query as: [ ]

Shared

Continue

[ Budget Queries | Encumbrance Query | Approve Documents | Delete Finance Template/Queries ]

RELEASE: 8.3

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# Sample Budget Query via Portal

The screenshot shows a Windows Internet Explorer browser window displaying the SunGard Higher Education portal for Mt. San Antonio College. The browser's address bar shows the URL <https://myportal.mtsac.edu/render.U>. The page header includes the college name and logo, navigation tabs for various services (Personal Information, Student, Faculty Services, Employee, Finance, Advisor, Pos. Attendance, Lab Attendance), and utility links (eMail, Calendar, Groups, Logout, Help). A search bar is present with a 'Go' button. The main content area is titled 'Budget Queries' and includes a user identification string 'A01427960 Donna E. Burns' and a timestamp 'Dec 16, 2011 11:04 am'. Two informational paragraphs provide instructions on how to use the budget query tool. Below the text is a form with various input fields and dropdown menus for specifying query parameters. At the bottom of the form is a 'Submit Query' button.

**Budget Queries** A01427960 Donna E. Burns  
Dec 16, 2011 11:04 am

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.

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.

<b>Fiscal year:</b>	2011	<b>Fiscal period:</b>	05
<b>Comparison Fiscal year:</b>	None	<b>Comparison Fiscal period:</b>	None
<b>Commitment Type:</b>	All		
Chart of Accounts	M	Index	
Fund	11000	Activity	
Organization	410000	Location	
Grant		Fund Type	
Account	111000	Account Type	
Program			

Include Revenue Accounts

Save Query as:

Shared

Sample Budget Query via Portal

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**report Parameters**

**Organization Budget Status Report**

**By Account**

**Period Ending Nov 30, 2010**

**As of Dec 16, 2011**

Chart of Accounts M Mt San Antonio College Commitment Type All

Fund	11000 Unrestricted General Fund-Ongoing Program	All
Organization	410000 Non Credit Adult Education Activity	All
Account	111000 Instructional Salaries-Regular Location	All

**Query Results**

Account	Account Title	FY11/PD05 Adjusted Budget	FY11/PD05 Year to Date	FY11/PD05 Commitments	FY11/PD05 Available Balance
111000	Instructional Salaries-Regular	102,211.00	37,167.28	0.00	65,043.72
Report Total (of all records)		102,211.00	37,167.28	0.00	65,043.72

Download All Ledger Columns    Download Selected Ledger Columns

Save Query as:

Shared

**Compute Additional Columns for the query**

Column 1	Operator	Column 2	Display After Column
FY11/PD05 Adopted Budget	percent of	FY11/PD05 Adopted Budget	FY11/PD05 Adopted Budget

Perform Computation

Another Query

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