How to Access a Grant Expenditure Report
(Budget Query)

Budget Query is the tool accessed via WP Connect that is used to view budget vs actual financial status for any University Fund-Org combination. It is available to all Banner users for the fund-org combination(s) to which a user has been granted Banner access.

Using this tool, PIs and other grant administrators can view the budget vs. actual status of their grants. Actual expenditures and commitments will be reflected for fiscal year periods only. This tool will not display inception-to-date expenditures.

To view grant expenditures via the Budget Query tool, follow these instructions:

1. Log on to WPConnect
2. Click on Employee (Located top left of the screen)
3. Click on Finance (Located far left of the screen)
4. Click on Budget Query (under the "Budget" Category)
5. Under Create a New Query Type: choose "Budget status by Account"
6. Click on "Create Query"

7. Choose the following :
   a. Accounted Budget
   b. Year to Date
   c. Encumbrances
   d. Reservations
   e. Commitments
   f. Available Balance
8. Click on "Continue"

9. At the next screen, choose the following:

    a. "Fiscal Year"
    b. Comparison Fiscal Year: "None"
    c. Commitment Type: "All"
    d. Chart of Accounts: "U"
    e. Fund
    f. Organization
    g. Fiscal Period: 14 (this is to see all period as of current date, you can choose different periods to view month to date information e.g. period 1= July, Period 6 = July through December).
    h. Comparison Fiscal Period : "None"
    i. All other options can be left blank
    j. Click on "Submit Query"

Sample Budget Query Report:

You can drill down into detail for any item highlighted in blue

Click one of the "download" buttons to get data in Excel