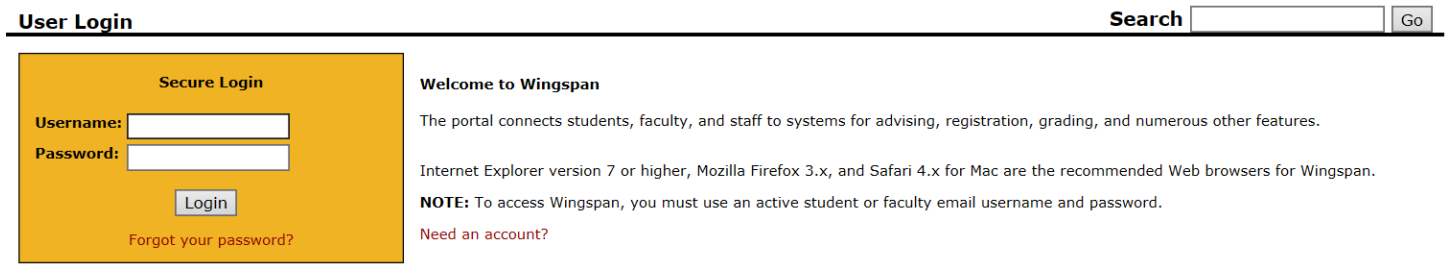


# HOW TO RUN BUDGET-TO-ACTUAL GRANT REPORTS IN WINGSPAN

1. Click on WINGSPAN from any Winthrop University webpage.



2. Login to Wingspan with your Winthrop username and password.



3. Click on the "Finance" tab

4. Click on "Budget Queries."



[ [Budget Queries](#) | [Encumbrance Query](#) | [Requisition](#) | [Approve Documents](#) | [View Document](#) ]

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5. Select "Budget Status by Account" from the dropdown box. Click on "Create Query."

Home Personal Information Employee Detail Finance

**Budget Queries** MENU Search  Go

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

[ Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document ]

6. Select the following categories to include on your report and then click Continue:
- a. Adjusted Budget
  - b. Year-to-Date
  - c. Encumbrances
  - d. Available Balance

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**Budget Queries** MENU Search  Go

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 checked="" type="checkbox"/> Encumbrances
<input checked="" type="checkbox"/> Adjusted Budget	<input type="checkbox"/> Reservations
<input type="checkbox"/> Temporary Budget	<input type="checkbox"/> Commitments
<input type="checkbox"/> Accounted Budget	<input checked="" type="checkbox"/> Available Balance

Save Query as:

Shared

[ Budget Queries | Encumbrance Query | Requisition | Approve Documents | View Document ]

7. On the Budget Queries fill in the following information and click "Submit Query":
  - a. Fiscal Year: 2018 for July 1, 2017-June 30, 2018; 2019 for July 1, 2018-June 30, 2019
  - b. Fiscal Period: 14
  - c. Chart of Accounts: W (Capital)
  - d. Fund: this is the 6-digit number beginning with 3 assigned to your grant
  - e. Grant: this is your 5-digit grant account number that begins with a capital G
  - f. Leave all other dropboxes in their default mode

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**Budget Queries**
MENU Search 
Go

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.

Fiscal year:	<input type="text" value="2018"/>	Fiscal period:	<input type="text" value="14"/>	
Comparison Fiscal year:	<input type="text" value="None"/>	Comparison Fiscal period:	<input type="text" value="None"/>	
Commitment Type:	<input type="text" value="All"/>			
Chart of Accounts	<input type="text" value="W"/>	Index	<input type="text"/>	
Fund	<input type="text" value="300000"/>	Activity	<input type="text"/>	
Organization	<input type="text"/>	Location	<input type="text"/>	
Grant	<input type="text" value="G11111"/>	Fund Type	<input type="text"/>	
Account	<input type="text"/>	Account Type	<input type="text"/>	
Program	<input type="text"/>			

Include Revenue Accounts

Save Query as:

Shared

8. The Fund Box will list the Fund Code number (that begins with a 3) and the name of the grant.
9. The Grant box will list the grant number and the name of the grant.
10. The Account and Account Title are expense categories where costs are budgeted and posted to your grant.
11. The Adjusted Budget column should be the budget balance for the year you selected in the Budget Queries screen.
12. Year-to-Date expenses are expenses incurred from the beginning of the fiscal year July 1<sup>st</sup> to the date of the report.
13. Encumbrances are items that have been ordered but not yet received and paid.
14. Available Balance = Adjusted Budget minus Year-to-Date expenses minus Encumbrances.
15. Click on "Download All Ledger Columns" to download this report into an Excel Spreadsheet.

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.

Use the View Pending Documents button to display unposted documents in process that are excluded from the Budget Status Report. Also select the View Pending Documents button to view a summary of the available balances used for non-sufficient funds (NSF) checking.

**Report Parameters**

<b>Grant Inception to Date Report</b>			
<b>By Account</b>			
<b>Period Ending Jun 30, 2018</b>			
<b>As of Aug 06, 2018</b>			
Chart of Accounts	W Winthrop University	Commitment Type	All
Fund	3 [REDACTED]	Program	All
Organization	All	Activity	All
Account	All	Location	All
Grant	G1 [REDACTED]		

**Query Results**

Account	Account Title	GY17/PD12 Adjusted Budget	GY17/PD12 Year to Date	GY17/PD12 Encumbrances	GY17/PD12 Available Balance
50090	Faculty Interim	5,000.00	0.00	0.00	5,000.00
50160	Dual Employment Comp	12,003.00	16,582.19	0.00	( 4,579.19)
50310	Temporary Help	9,006.00	0.00	0.00	9,006.00
50330	Undergrad Student Wages	0.00	9,003.20	0.00	( 9,003.20)
51010	FRINGE BENEFITS BUDGET ACCOUNT	4,576.00	0.00	0.00	4,576.00
51020	FRINGE BENEFITS GENERAL	0.00	4,905.98	0.00	( 4,905.98)
71005	DIRECT OPERATING BUDGET ACCOUNT	19,415.00	0.00	0.00	19,415.00
71195	Research Supplies	0.00	16,297.57	0.00	( 16,297.57)
74020	Capital Exp Scientific Lab Equip	0.00	3,000.00	0.00	( 3,000.00)
77690	Retained Indirect Cost	18,351.00	18,294.82	0.00	56.18
Report Total (of all records)		68,351.00	68,083.76	0.00	267.24

Download All Ledger Columns Download Selected Ledger Columns



16. Contact GSRD (x2419) if you need assistance running your report or have any questions.