CSU X-PRESS BUDGET QUERY

1. Go to the CSU homepage
2. Click on Cougar Connect on the top right hand corner
3. Login in to Cougar Connect using your user name and password
4. Click on the home tab
5. Click on the CSU X-Press Menu. Chose Finance folder & then Budget Query subfolder.
6. Choose Budget Status by Organizational Hierarchy from drop down screen, then create a query.
7. Next screen are the query boxes, all should be marked except "Temporary Budget" & "Reservations" then click Continue
8. Next screen Fiscal Year – current year Fiscal period – current month
   A. Comparison Fiscal year and Fiscal period should be marked as none.
   B. Commitment type is “ALL”
   C. Chart of Accounts is “1”
   D. Fund fill in with “L1” or leave it blank
   E. Organization – is department’s number
   F. Account type “70” for non-salary accounts & “61” for personal services
   G. Submit query
9. Next screen Organization Budget Status Screen
10. Click on “70” this will show you all non-salary accounts and their detail information.
11. For individual detail of accounts click on corresponding number to the left hand side of the table.
12. Final Screen the columns on the table represent the following:

   A. Adopted Budget – Original Budget Load
   B. Budget Adjustments – Any Budget transfers you submit to the Budget Office.
   C. Adjusted Budget - Net sum of A & B
   D. Accounted Budget – Yearly budget
   E. Year-to-date – Payments by Financial Affairs to various vendors per department’s submission.
   F. Encumbrances - Requisitions
   G. Commitments - Purchase Orders
   H. Available balance – amount remaining to be used by department
   I. If there is a deficit in any line the budget transfer would be returned to the department for lack of funds.