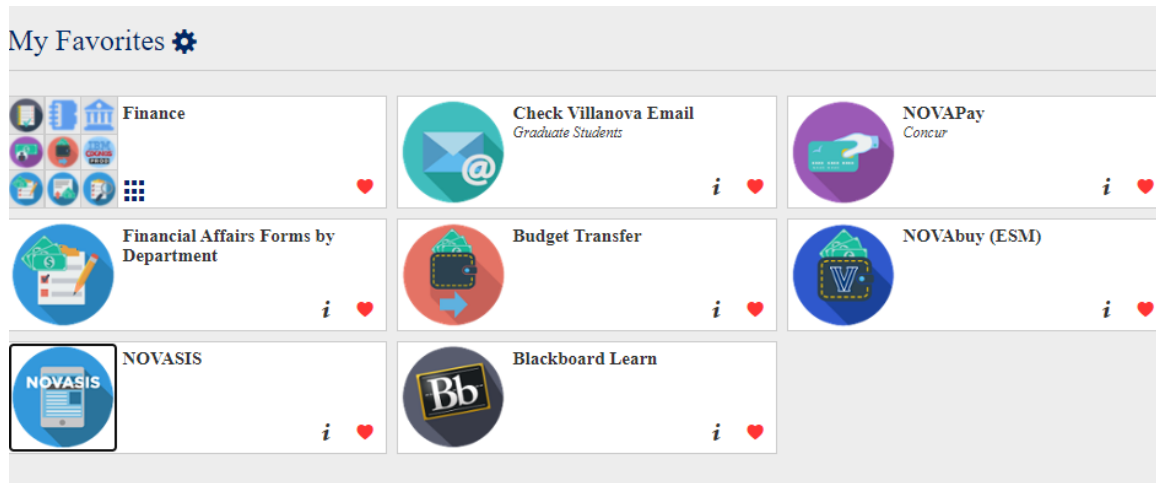


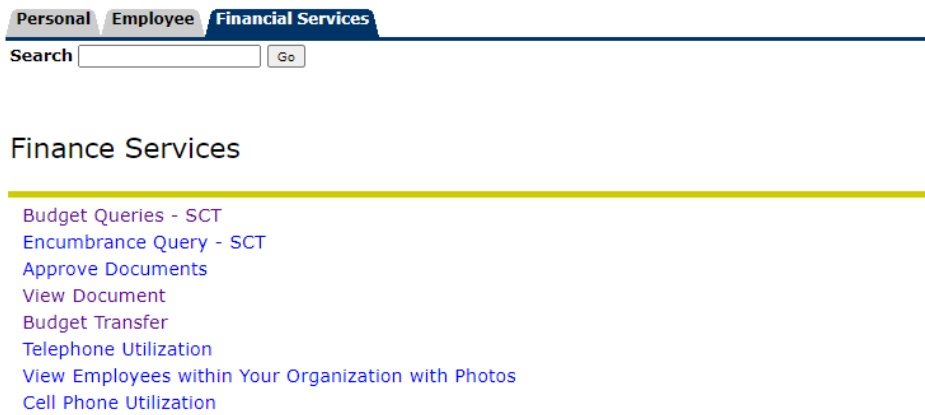
# GRANT INCEPTION TO DATE REPORTING USING NOVASIS

Use the following steps to view the activity for any grant you are authorized to report on.

1. Log Into “MyNova” and find "Novasis"



2. Click on the **Financial Services Tab** and select **Budget Query** to navigate to the Budget Query page.



- Under “Create a New Query,” make sure **Budget Status by Account** appears in the drop-down menu, then click the **Create Query** icon.

Personal Employee **Financial Services**

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Search  Go

Budget Queries

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To create a new query choose a query type and select Create Query. To retrieve an existing

For instructions on using Budget Query, [click here](#).

**Create a New Query**

Type

Retrieve Existing Query

Saved Query

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- Check the following checkboxes for your report:
  - Accounted Budget – total current budget
  - Year to Date – all expenses to date
  - Commitments – any Requisitions or Purchase Orders yet to be invoiced
  - Available Balance

Personal Employee **Financial Services**

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Search  Go

Budget Queries

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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 checked="" type="checkbox"/> Accounted Budget	<input checked="" type="checkbox"/> Available Balance

Save Query as:

Shared

---

- Click the **Continue** button

6. Enter the appropriate parameters for your report:

**Fiscal Year:** enter the fiscal year you would like to report on

**Fiscal Period:** Enter “14” for year-to-date information. If you want your report to show activity as of the end of a specific month, enter the appropriate period as follows:

<u>Fiscal Period</u>	<u>Month</u>
01	June
02	July
03	August
04	September
05	October
06	November
07	December
08	January
09	February
10	March
11	April
12	May
13	Not Used
14	May + year end entries

**Commitment Type:** All

**Chart of Accounts:** “1”

**Grant:** The grant number on which you want to report is the same as index number assigned to your grant

**All other fields:** Leave Blank

“Include Revenue Accounts” should be **unchecked**

Budget Queries

For a Budget Query to be successful, a user with Fund Organization query access must enter a value in either the Fiscal Year or Fiscal Period. 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.

<b>Fiscal year:</b>	2021	<b>Fiscal period:</b>	14
<b>Comparison Fiscal year:</b>	None	<b>Comparison Fiscal period:</b>	None
<b>Commitment Type:</b>	All		
Chart of Accounts	1	Index	
Fund		Activity	
Organization		Location	
Grant	530015	Fund Type	
Account		Account Type	
Program			
<input type="checkbox"/> Include Revenue Accounts			
Save Query as: <input type="text"/>			
<input type="checkbox"/> Shared			
<input type="button" value="Submit Query"/>			

7. Click the **Submit Query** button.

The page will refresh and display the results of the **Grant Inception to Date Report**.

Report Parameters			
Grant Inception to Date Report			
By Account			
Period Ending May 31, 2021			
As of Mar 03, 2021			
Chart of Accounts	1 Villanova University	Commitment Type	All
Fund	All	Program	All
Organization	All	Activity	All
Account	All	Location	All
Grant	530015 Izzetoglu/NIH thru Einstein		

Query Results						
Account	Account Title	GY20/PD09 Adjusted Budget	GY20/PD09 Accounted Budget	GY20/PD09 Year to Date	GY20/PD09 Commitments	GY20/PD09 Available Balance
7211	Faculty - Tenure/Tenure Track	0.00	0.00	0.00	0.00	0.00
7212	Faculty - Contin Non-tenure Track	0.00	0.00	1,933.33	0.00	( 1,933.33)
7213	Faculty - Principal Investigator	14,790.00	14,790.00	13,533.31	0.00	1,256.69
7332	Printing/Publ - External	882.00	882.00	0.00	0.00	882.00
7438	Other G+A - G&C Deficit Clearing	0.00	0.00	( 351.76)	0.00	351.76
7908	Fringe Benefit Cost - FT	4,838.00	4,838.00	5,059.16	0.00	( 221.16)
7911	Indirect Costs - Federal	7,351.00	7,351.00	7,686.96	0.00	( 335.96)
Report Total (of all records)		27,861.00	27,861.00	27,861.00	0.00	0.00

[Download All Ledger Columns](#)
[Download Selected Ledger Columns](#)

**Options:**

Once the report is displayed, you can drill down on the data to display transaction detail (this takes a couple minutes). Once the transaction detail is displayed, you can click on a document number (an invoice, for example) and view the document detail.

By clicking the Download Selected Ledger Columns button, you can view/save the report data in MS Excel.