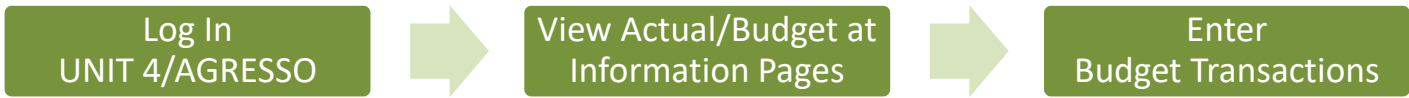


UNIT 4 Planner at a Glance: 3-Step Budgeting Process (Account Holder / Alternate)



Log In UNIT 4/AGRESSO

View Actual/Budget at Information Page

Go to [UNIT 4/AGRESSO](#) | [Information pages](#) | [Global information pages](#) | [Account Budget](#)

Both Account holders & Alternates have access to their responsible accounts.

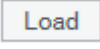
View year-to-date (YTD) actual versus budget details, including existing encumbrances for this year and next year, YTD actual spending versus budget for this year, and full year actual versus budget for last year. Print the page or Export to Excel for future reference.


N.B. Once the budget transactions are entered, the budget details will be shown in the first tab “Budget Details (Working)”.

#	ACCOUNT	ACCOUNT (T)	SubAccount	Budget Next Year (W)	Encumb Next Year	Encumb This Year	Actual This Year	Budget This Year	Actual Last Year	Budget Last Year
+	Σ1	1001	MATERIAL MANA...	10,000.00	0.00	5,436,371...	55,143.84	55,000.00	60,036.15	51,000.00
12	4022	STORES BACKCHAR...		0.00	0.00	0.00	0.00	0.00	0.00	0.00
13	4022	STORES BACKCHAR...	ADJUST	0.00	0.00	0.00	1,223.59	0.00	-1,922.99	0.00
14	4022	STORES BACKCHAR...	GAIN	0.00	0.00	0.00	0.00	0.00	0.80	0.00
15	4022	STORES BACKCHAR...	HELIUM	0.00	0.00	55,596.78	-10,675.63	0.00	10,705.59	0.00
16	4022	STORES BACKCHAR...	ISSUES	0.00	0.00	48,697.84	840.70	0.00	15,626.24	0.00
17	4022	STORES BACKCHAR...	LOSS	0.00	0.00	0.00	0.00	0.00	0.00	0.00
18	4022	STORES BACKCHAR...	PURCHASE	0.00	0.00	0.00	0.00	0.00	0.00	0.00
19	4022	STORES BACKCHAR...	SHOP	0.00	0.00	0.00	2.00	0.00	13.60	0.00
Σ1	4022	STORES BACKCHA...		0.00	0.00	104,294.62	-8,609.34	0.00	24,423.24	0.00
Σ				10,000.00	0.00	5,540,665.94	46,534.50	55,000.00	84,459.39	51,000.00

Enter Budget Transactions

Go to UNIT 4/AGRESSO | Planner | Transactions | Transaction Entry

Enter the selection criteria, press **Tab** to validate each selection and move to the next one. After the criteria is selected, press  to open the budget entry screen.

N.B. the  will not be activated until the criteria are entered properly.


Enter the selection criteria, press **Tab** to validate each selection and move to the next one.

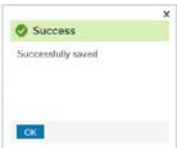
1) Default version: "2021W-2021 (1) Working Budget"

2) Input "OPBUDACC"

3) Choose "Fund" "1" for NRC accounts.

4) Click Load

Click the first empty row to create a new transaction entry. Use dropdown list to enter **Account**, **Sub Account**, and then **Budget Type**. Enter budget descriptions in **Description** and amount in Canadian dollars in **Budget**. **Reference** code is optional. Enter all the * required fields and then press .



indicates the transaction entry is saved.

N.B. Make sure enter budget transaction entries by the deadline. No entries are allowed once the working version is closed.

Unit 4 Planner at a Glance: 3-Step Budgeting Process (Account Holder / Alternate)

Transaction entry

Selection criteria Transactions

Version 2020W - 2020 (1) Working Budget

Selection criteria

Account from relation on Fund: National Research Council Fund (1)

Graphical presentation

Budget Type:
 Operations – annual operational costs (e.g. MRO)
 Upgrade – non-annual operational costs (e.g. Network upgrades)
 Major- one-time costs (e.g. Consultant study)

Zoom	Account	Sub Account	Budget Type	Description	Budget	Reference
	1001 4022	CARDS CONSUM FREIGHT GAS ICBC MRO STATION VEHICLES VISA WATER	MAJOR OPERATIONS UPGRADE	Description: free-form text field, max 255 characters	0.00	Reference, can be PO#, document name, grants ref #, etc. Max 25 characters

Save Clear Get template data Update template data Set values to zero Move start period Copy to version