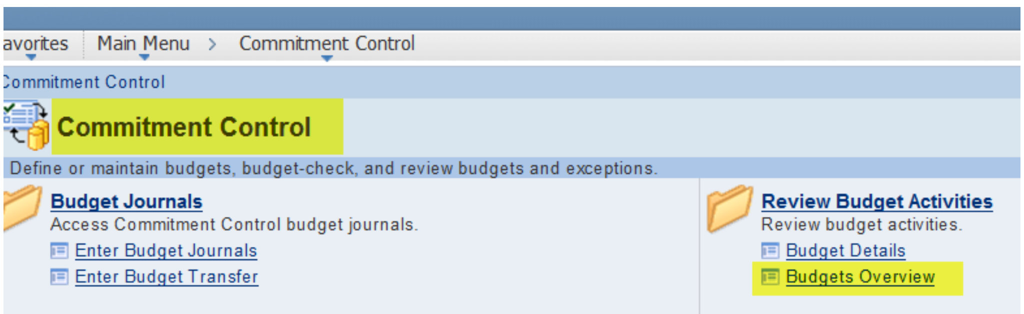
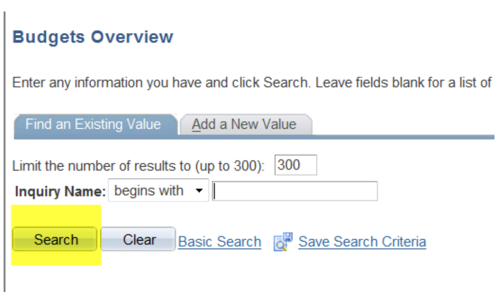
How to Utilize Budgets Overview in PeopleSoft 9.1

Utilizing the budget overview feature in PeopleSoft will allow users to see the status of a department or grant budget; it is a tool that can be used when looking up something quickly. It is like a querying page where you will enter certain information like your dept ID to look up the budget information. The overview can be seen by following these steps.

1. Navigate to **Commitment Control** and then click on **Budgets Overview.**



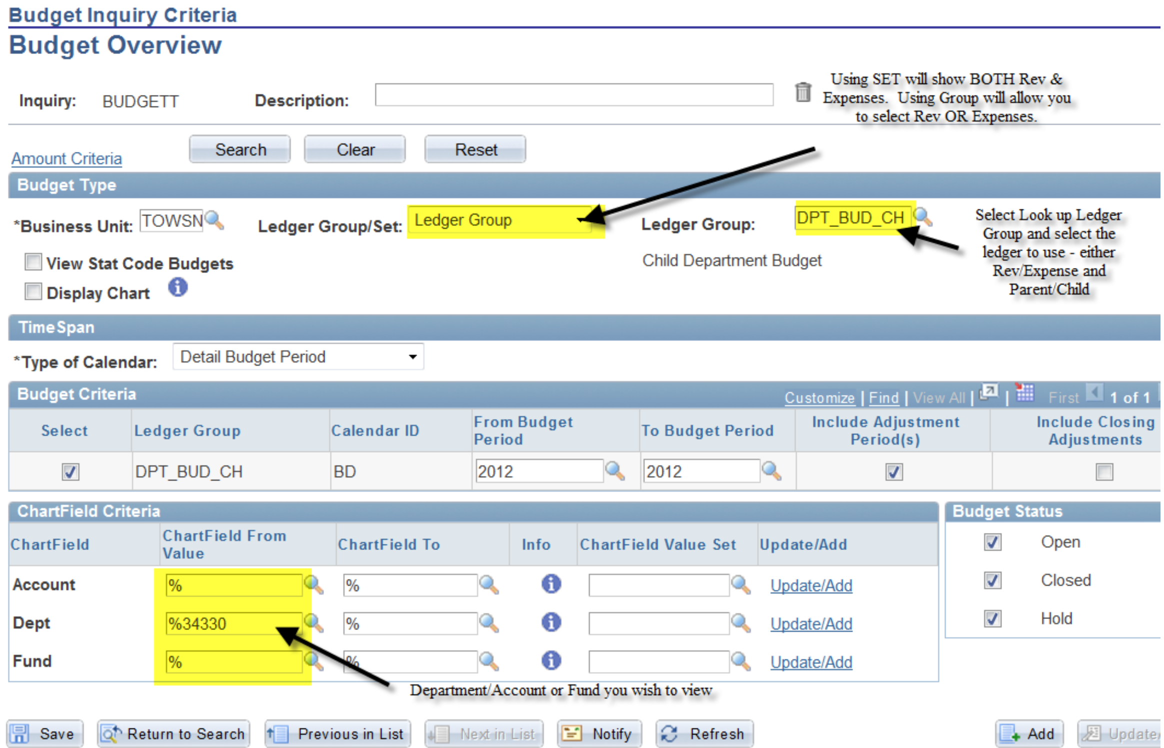
2. Click the **Search** button to select a saved inquiry.



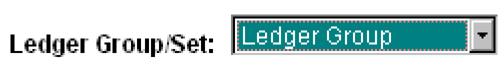
Note: If you do not have an existing Inquiry (or Run Control) you will have to create one by clicking on the **Add a New Value tab**. Give your Run Control a name**. A suggestion is that you enter the Dept ID or name of your department then click ADD**. You can create as many Run Controls as you would like (one for each dept ID if you like), but you can also just keep one and change the criteria each time.

3. After clicking Search, if you have more than one Inquiry, your saved inquiries will appear. Select an inquiry under the **Inquiry Name** column to select which inquiry you want to use. If you only created one inquiry, you will not have anything to select from the  system takes directly to your criteria.

4. Your Inquiry criteria now appears.

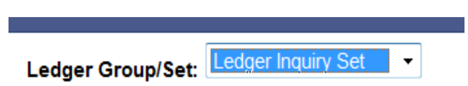


5. To view EXPENSE OR REVENUE separately:
    a. Select **Ledger Group** from the drop down box for your criteria.



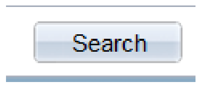
    b. Click the **Look up Ledger Group** button to return the list of ledger groups to choose from for your criteria. Select the ledger group you want to search on. You can select a DPT_BUD_PA ledger to see parent budget, DPT_BUD_CH ledger to see child budget, or DPT_REV ledger to see revenue.

6. To view BOTH EXPENSE AND REVENUE together:
    a. Select **LEDGER INQUIRY SET** for the Ledger Group/Set.

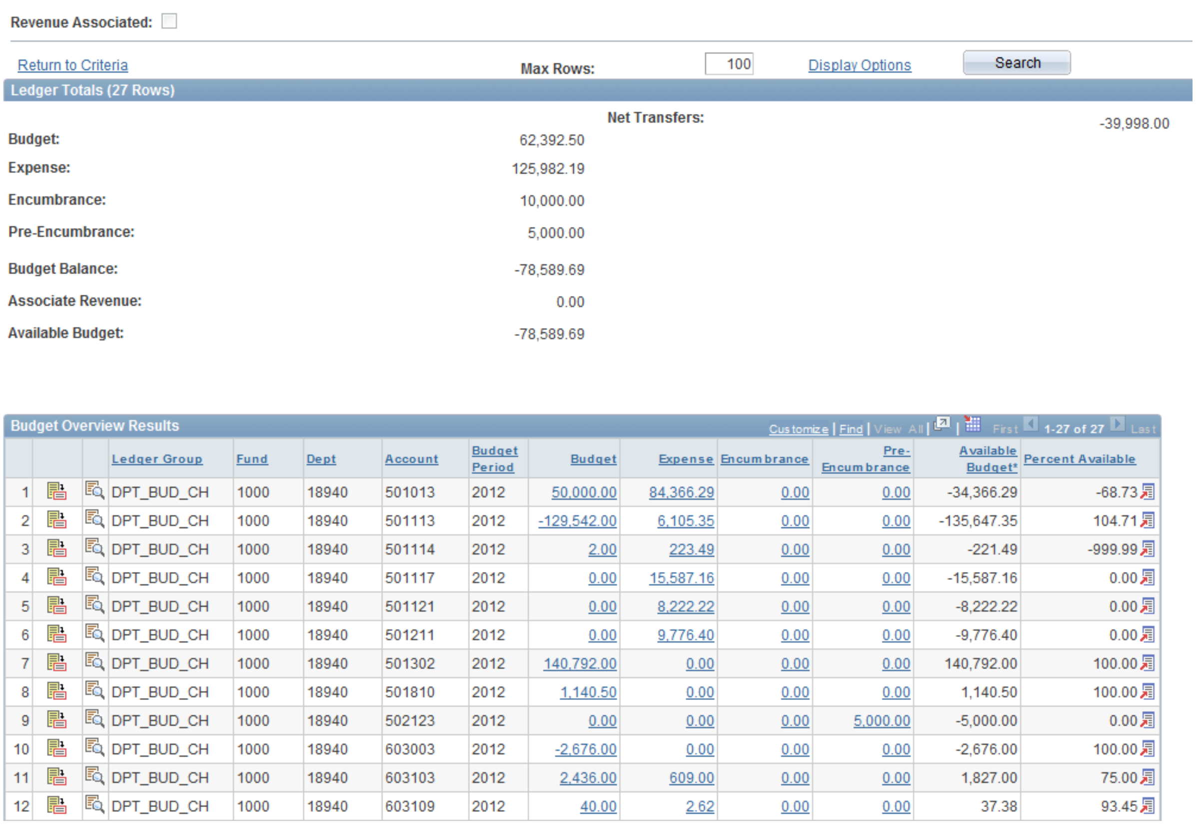


    b. Click the **Look up Ledger Inquiry set** button to return the list of ledger groups to choose from for your criteria. Select the ledger inquiry set you want to search on. Select REV&EXP for departments; or GRPJ_RV_EX for grants/projects.

7. Enter the **5-digit DEPT ID** into the CHARTFIELD CRITERIA at the bottom of the page in the **DEPT field.** Note: % represents wildcard and can be removed when typing in the full value of DEPT ID. You can also enter a specific Account if you so chose or 604% to bring up only Travel accounts.
8. Click the **Search** button which is located at the TOP of the page.



9. The below results will be displayed when using the LEDGER GROUP and DPT_BUD_CH (CHILD EXPENSE BUDGET VIEW)



Revenue Associated:

Return to Criteria | Max Rows: 100 | Display Options | Search

Ledger Totals (27 Rows)

		Net Transfers:	-39,998.00
Budget:	62,392.50		
Expense:	125,982.19		
Encumbrance:	10,000.00		
Pre-Encumbrance:	5,000.00		
Budget Balance:	-78,589.69		
Associate Revenue:	0.00		
Available Budget:	-78,589.69		

Budget Overview Results — Customize | Find | View All | First 1-27 of 27 Last

	Ledger Group	Fund	Dept	Account	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
1	DPT_BUD_CH	1000	18940	501013	2012	50,000.00	84,366.29	0.00	0.00	-34,366.29	-68.73
2	DPT_BUD_CH	1000	18940	501113	2012	-129,542.00	6,105.35	0.00	0.00	-135,647.35	104.71
3	DPT_BUD_CH	1000	18940	501114	2012	2.00	223.49	0.00	0.00	-221.49	-999.99
4	DPT_BUD_CH	1000	18940	501117	2012	0.00	15,587.16	0.00	0.00	-15,587.16	0.00
5	DPT_BUD_CH	1000	18940	501121	2012	0.00	8,222.22	0.00	0.00	-8,222.22	0.00
6	DPT_BUD_CH	1000	18940	501211	2012	0.00	9,776.40	0.00	0.00	-9,776.40	0.00
7	DPT_BUD_CH	1000	18940	501302	2012	140,792.00	0.00	0.00	0.00	140,792.00	100.00
8	DPT_BUD_CH	1000	18940	501810	2012	1,140.50	0.00	0.00	0.00	1,140.50	100.00
9	DPT_BUD_CH	1000	18940	502123	2012	0.00	0.00	0.00	5,000.00	-5,000.00	0.00
10	DPT_BUD_CH	1000	18940	603003	2012	-2,676.00	0.00	0.00	0.00	-2,676.00	100.00
11	DPT_BUD_CH	1000	18940	603103	2012	2,436.00	609.00	0.00	0.00	1,827.00	75.00
12	DPT_BUD_CH	1000	18940	603109	2012	40.00	2.62	0.00	0.00	37.38	93.45

10. In the Budget Overview - click on any of the blue dollar amounts to drill down to details in the Activity Log.

Activity Log

Ledger: C_DEPT_BUD

Activity Log — Customize | Find | View All | First

Tran Line	Document Label	Document ID	Ref Bdgt?	Fund	Dept	Account	Budget Period	Year	Period	Foreign Amount	Foreign Currency	Monetary Amount	Base Currency	Budget Entry Type	Auto Generated Parent Ln	Tran I
821	Journal ID:	0000038456	N	1000	18940	603003	2012	2012	1	50.00	USD	50.00	USD	Original	N	0000
3	Journal ID:	0000042113	N	1000	18940	603003	2012	2012	4	-2,726.00	USD	-2,726.00	USD	Adjustment	N	0000

OK

11. Click **OK** at the bottom of the page to return to prior page.

12. Click on the **RETURN TO CRITERIA** link to return to criteria page to enter different Return to Criteria criteria if so desired.

13. End Procedure.

NOTE: Budget overview does not give account description at this time, so you should know what account you are looking for or have a guide close by. Budget overview is also currently the only place where you can track initiative budgets.