HOW TO UTILIZE BUDGETS OVERVIEW IN PSF 9.1 (USING A PC OR MAC)

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.

   ![Commitment Control](image1)

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

   ![Budgets Overview](image2)

   **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.

   **Ledger Group/Set:** [Dropdown]

   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.

   **Ledger Group:** [Input Field]

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

   **Ledger Group/Set:** [Dropdown]

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

![Activity Log](image)

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

   criteria if so desired.


**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.*