Using Budgets Overview to find Grant Budget Information

Utilizing the budget overview feature in PeopleSoft will allow you to see the status of your 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 grant 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 name of your grant and/or grant ID then click ADD. You can create as many Run Controls as you would like (one for each grant 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.

5. To view BOTH EXPENSE AND REVENUE BUDGETS TOGETHER select the following:
   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.
   c. Then select GRPJ_RV_EX for the Ledger Inquiry Set.

6. To view EXPENSE OR REVENUE BUDGETS ONLY select the following:
   a. Select Ledger Group from the drop down box for your criteria.

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    Ledger Group/Set:  

   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 GRNT_BUD_PA parent ledger to see summary, GRNT_BUD_PA child ledger to see detail, or GRT_REV revenue ledger to see revenue.

    Ledger Group:  

7. Enter the 7-digit Grant ID into the CHARTFIELD CRITERIA at the bottom of the page in the GRT/PROJ field. Note: % represents wildcard and can be removed when typing in the full
value of Grant 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 INQUIRY SET which shows your child budgets for expense and revenues.

10. The below results will be displayed when using the LEDGER GROUP and GRNT_BUD_PA (PARENT EXPENSE BUDGET VIEW)
11. Click on any of the blue dollar amounts to drill down to details.

12. From the Activity Log page you can then click the + sign to get even more information if available.

13. Click **OK** to return to prior page.

14. Click on **Return to Criteria** to return to criteria page to enter different criteria if so desired.

15. 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.