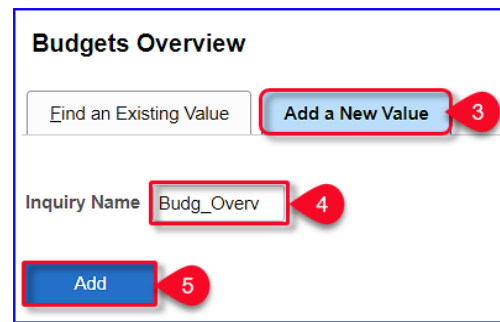
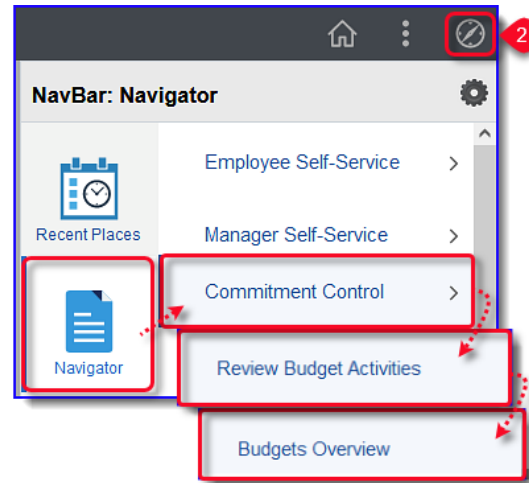


How to Run the Budget Overview

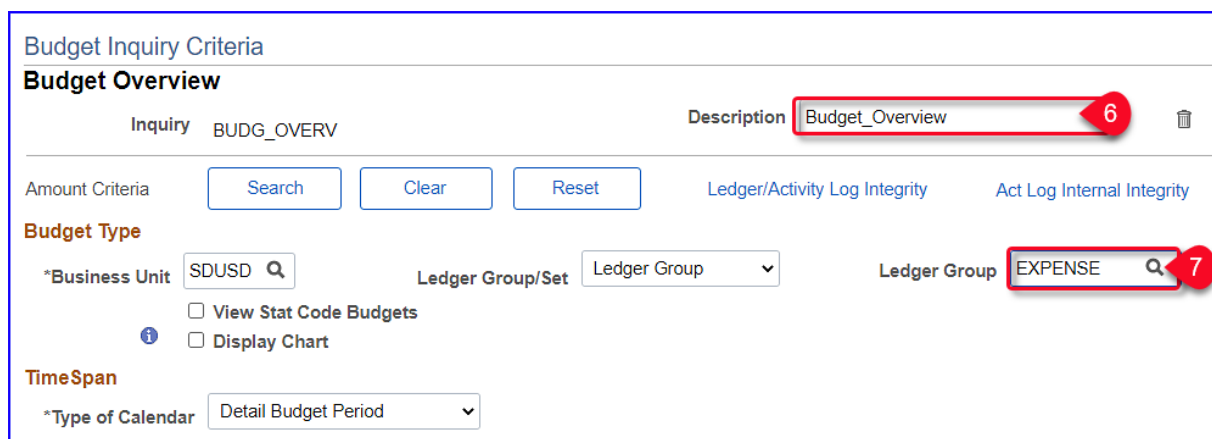
Budget Overview allows users to view budgets and actuals without running a report. Run this query for valid open budget strings used for eProcurement requisitions, Travel Authorizations, etc. This query reports against single or multiple site budgets to display original allocations, expensed and encumbered amounts for the fiscal year.

1. Log in to **PeopleSoft FIN**, [found here](#), with your six-digit Employee ID number and password.
2. Navigate to page:
 - Click **NavBar**.
 - Select **Navigator**.
 - Select **Commitment Control**.
 - Select **Review Budget Activities**.
 - Select **Budgets Overview**.
3. Select **Add a New Value tab (only during first time setup)**.
4. Enter a name in **Inquiry Name**. **Note:** Do not use spaces or special characters. Use an underscore (_) to separate words, if needed.
5. Click **Add**.



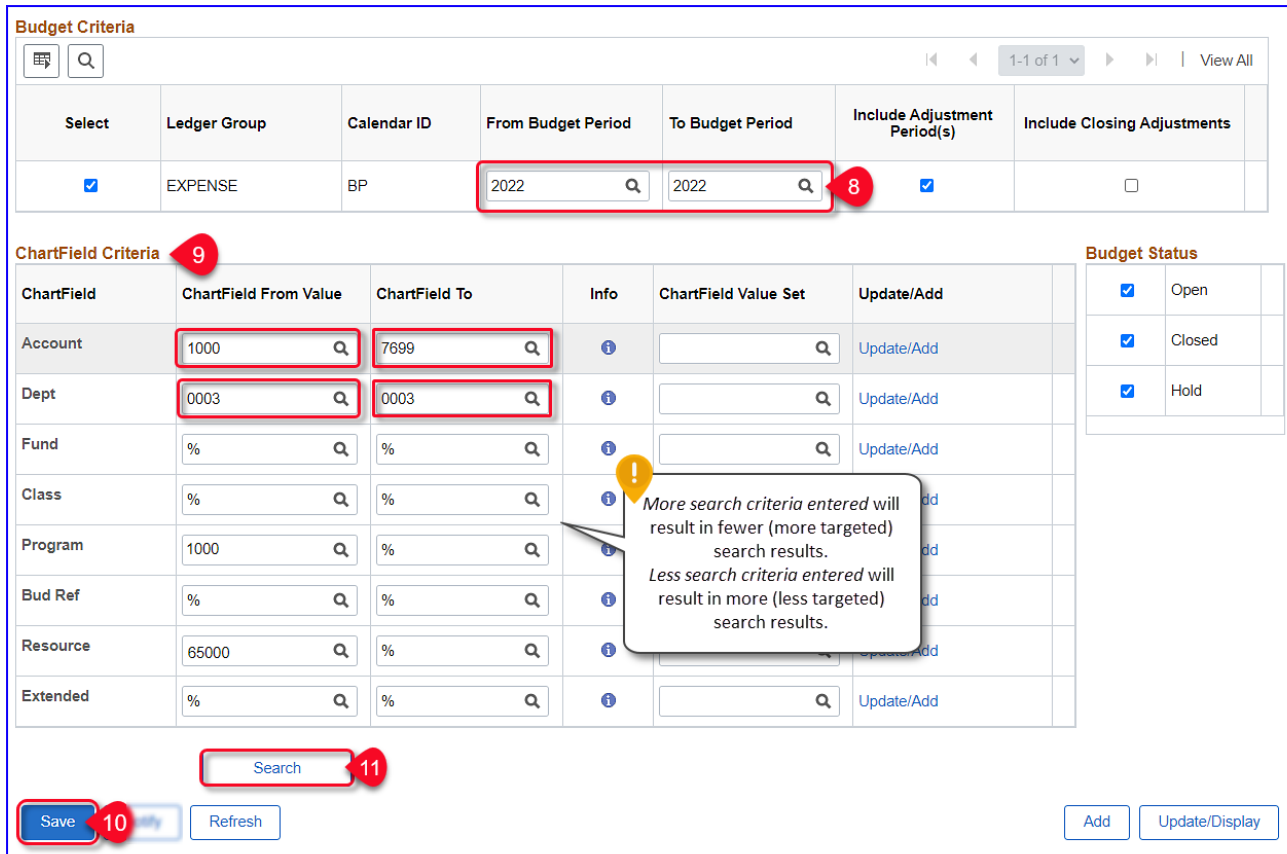
On the **Budget Inquiry Criteria** page:

6. Enter name in **Description**.
7. Enter **EXPENSE** in **Ledger Group**.



How to Run the Budget Overview

8. The current fiscal year will populate in **From** and **To Budget Period** in **Budget Criteria** section.
Note: Enter previous fiscal year(s) to view historical data.
 9. In the **Chartfield Criteria** section, enter values to be searched for. **IMPORTANT!** If entering only one value per chartfield, enter it in the **ChartField From Value** column. If entering a range of values, use both the **ChartField From** and **ChartField To** columns.
 - Enter 1000 in **Account “Chartfield From Value”** and 7699 in **Account “Chartfield To”**.
 - Enter four-digit department code in **Dept**, in both **ChartField From Value** and **ChartField To**.
 10. Click **Save** for future use.
- IMPORTANT!** Run query anytime to retrieve current data. Always keep values in the **Account** and **Dept** Chartfields the same.
11. Click **Search** to run query.



Budget Criteria

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	EXPENSE	BP	2022	2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	1000	7699			Update/Add
Dept	0003	0003			Update/Add
Fund	%	%			Update/Add
Class	%	%			Update/Add
Program	1000	%			Update/Add
Bud Ref	%	%			Update/Add
Resource	65000	%			Update/Add
Extended	%	%			Update/Add

Budget Status

<input checked="" type="checkbox"/>	Open
<input checked="" type="checkbox"/>	Closed
<input checked="" type="checkbox"/>	Hold

More search criteria entered will result in fewer (more targeted) search results.
Less search criteria entered will result in more (less targeted) search results.

Search

Save Refresh Add Update/Display

It will take several moments for results to appear.

Inquiry Results page will display both a Ledger Summary and Chartfield string details of the budget, adjustments, transfers, actual expenditures to date, and encumbrances.

How to Run the Budget Overview

12. Notice the **Ledger Totals** section. Numbers represent the sum of the dollar amounts recorded against all the budgets that matches from, search criteria.

Inquiry Results

Business Unit SDUSD
Ledger Group EXPENSE
Type of Calendar Detail Budget Period
Amounts in Base Currency USD
Revenue Associated:

[Return to Criteria](#) 12 Max Rows Display Options

Ledger Totals (3 Rows)

Budget	1,100.00	Net Transfers	0.00
Expense	34.42		
Encumbrance	0.00		
Pre-Encumbrance	0.00		
Budget Balance	1,065.58		
Associate Revenue	0.00		
Available Budget	1,065.58		

Available Budget indicates if resource has enough funds to cover future expenditures.

13. In **Budget Overview Results**, the individual budgets that meet the search criteria display. **Note:** By default, a description of each chartfield of the budget string is added in the Budget Results grid. Scroll horizontally to see full budget string data. The **Available Budget** for each will appear in the far right column.

Budget Overview Results

	Details	Budget Transaction Types	Ledger Group	Dept	Department Description	Resource	ChartField1 Description	Bud Ref	Budget Reference Description
1			EXPENSE	0003	Adams Elementary	65000	Special Education NonPersonnel	00	No Budget Reference
2			EXPENSE	0003	Adams Elementary	65000	Special Education NonPersonnel	00	No Budget Reference
3			EXPENSE	0003	Adams Elementary	65000	Special Education NonPersonnel	00	No Budget Reference

The Budget Results grid displays a description for each chartfield. Use the scroll bar to view all budget string data.

14. Use the Grid Options Menu to hide the Description fields:

- Select Personalize from **Grid Options** menu.

Budget Overview Results

- Personalize
- Zoom Budget Overview Results
- Download Budget Overview Results Table to Excel

Ledger Group	Dept	Department Description
EXPENSE	0003	Adams Elementary

How to Run the Budget Overview

- Select each description column to be hidden in **Column Order**, click the **Hidden toggle box**.
- Click **OK**.

Grid Customization

Budget Overview Results

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

Column Order

- Details (frozen)
- Budget Transaction Types (frozen)
- Ledger Group
- Dept
- Department Description
- Resource
- ChartField1 Description
- Bud Ref
- Budget Reference Description
- Account
- Account Description
- Program
- Program Code Description
- Class
- Class Description
- Fund
- Fund Code Description
- Extended
- ChartField2 Description
- Budget Period
- Budget
- Expense
- Encumbrance
- Pre-Encumbrance
- Available Budget*
- Percent Available

Sort Order

Hidden



Frozen

Descending

OK
Cancel
Preview
Copy Settings

Without description columns, Budget Overview Results display in a more compact way.

15. If desired, drill into the details of a line by clicking on the icons and hyperlinks associated with that line.

- **Show Budget Details**  button will bring up budget details for the ledger row.
- **Budget Transaction Type**  button displays various budget amounts.

Budget Overview Results															
	Details	Budget Transaction Types	Ledger Group	Dept	Resource	Bud Ref	Class	Fund	Extended	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
1			EXPENSE	0003	65000	6730	01000	410		800.00	34.42	0.00	0.00	765.58	95.70
2			EXPENSE	0003	65000	5770	01000	42		200.00	0.00	0.00	0.00	200.00	100.00
3			EXPENSE	0003	65000	6730	01000	410		100.00	0.00	0.00	0.00	100.00	100.00