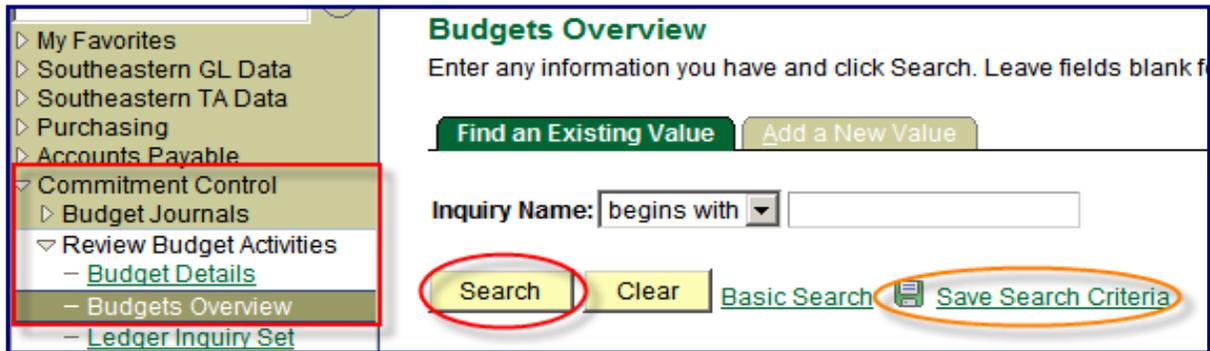


- After logging in to PeopleSoft Financials, navigate to **Budgets Overview**:  
**Commitment Control -> Review Budget Activities -> Budgets Overview**



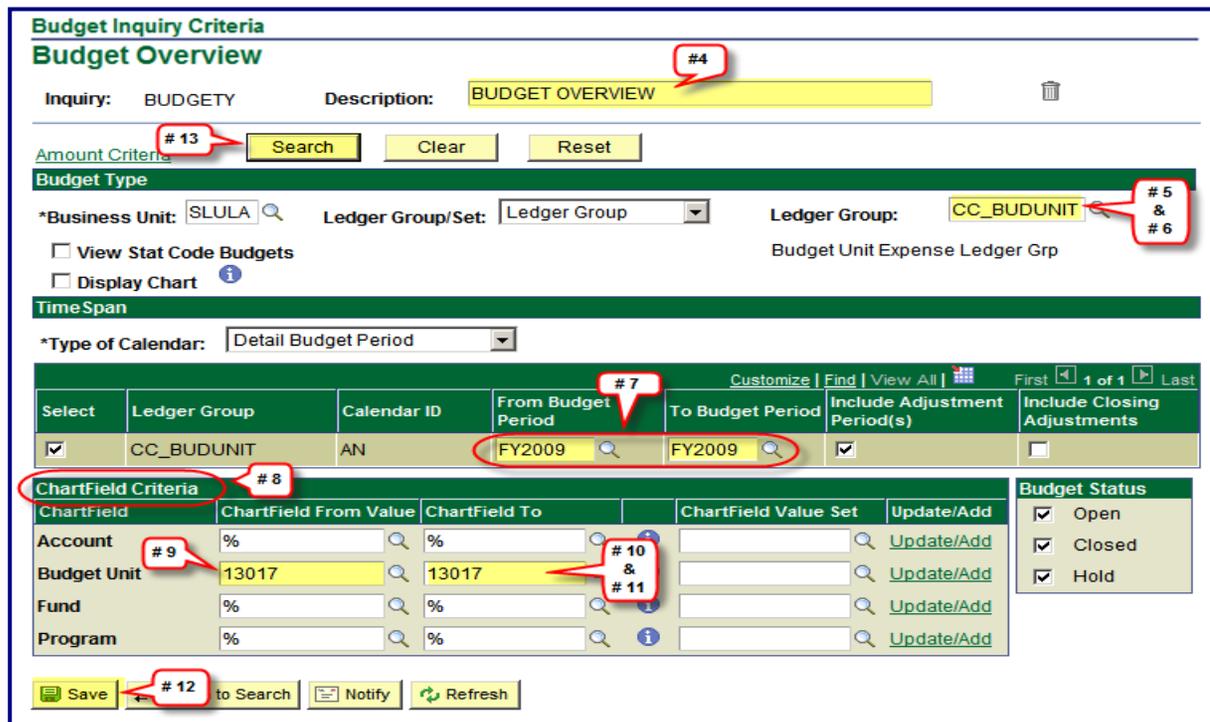
**Budgets Overview**  
 Enter any information you have and click Search. Leave fields blank if you are not sure.

Inquiry Name:

- Use the  button to see a list of your saved search criteria. If you have not previously saved a search criteria, click the **Add a New Value** tab.



- To create an inquiry screen, enter any name that you would like to use as the **Inquiry Name**. Enter a valid value, e.g. "**BUDGETY**". Click the  button.



**Budget Inquiry Criteria**  
**Budget Overview**

Inquiry: BUDGETY Description: BUDGET OVERVIEW

\*Business Unit: SLULA Ledger Group/Set: Ledger Group Ledger Group: CC\_BUDUNIT  
 View Stat Code Budgets Budget Unit Expense Ledger Grp  
 Display Chart

\*Type of Calendar: Detail Budget Period

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	CC_BUDUNIT	AN	FY2009	FY2009	<input checked="" type="checkbox"/>	<input type="checkbox"/>

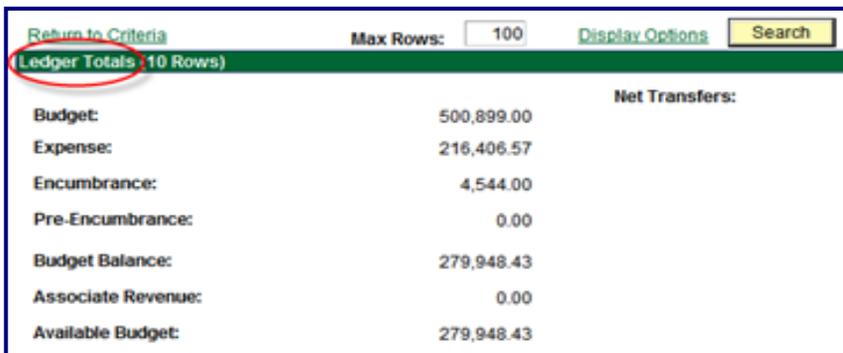
ChartField	ChartField From Value	ChartField To	ChartField Value Set	Update/Add
Account	%	%		<input type="button" value="Update/Add"/>
Budget Unit	13017	13017		<input type="button" value="Update/Add"/>
Fund	%	%		<input type="button" value="Update/Add"/>
Program	%	%		<input type="button" value="Update/Add"/>

## REVIEWING BUDGET UNITS

4. Enter the desired information in the **Description** field. Enter a valid value, e.g. **"BUDGET OVERVIEW"**.
5. Click in the **Ledger Group** field on the right side of the screen.
6. To see the budgeted amount, expenditures, and encumbrances for each expense category, use the **CC\_BUDUNIT** Ledger Group. For more detail use the **"CC\_DETAIL"** Ledger Group.

*Note: Expense accounts are grouped together at a "parent" level for budget checking. (For example, if a requisition is coded to expense account 540110, the requisition will pass budget check as long as there are sufficient funds in the 540000 parent account, which is the summation of all 54xxxx account budgets). To see the "parent" levels used for budget checking, select the CC\_BUDPAR Ledger Group for this field.*

7. Click in the **From Budget Period** field. When you click the **Form Budget Period** field, it will default to the current year and also populate the **To Budget Period** field. If another time period is needed, use the **LOOK UP** button for available time frames.
8. Click the **Budget Unit ChartField From Value** field in "ChartField Criteria" section.
9. Enter the 5-digit budget unit number that you want to review in the **ChartField From Value** field.
10. Click in the **ChartField To** field.
11. Enter the budget unit that you want to review into the **ChartField To** field.
12. Click the  button.
13. Click the  button.
14. The **Ledger Totals** section displays summary information.



Return to Criteria		Max Rows: 100	Display Options	Search
<b>Ledger Totals (10 Rows)</b>				
Budget:	500,899.00			<b>Net Transfers:</b>
Expense:	216,406.57			
Encumbrance:	4,544.00			
Pre-Encumbrance:	0.00			
Budget Balance:	279,948.43			
Associate Revenue:	0.00			
Available Budget:	279,948.43			

## REVIEWING BUDGET UNITS

15. The **Budget Overview Results** section displays budget encumbrances and expenses by account (or by parent grouping if you chose CC\_BUDPAR Ledger Group). Click the scrollbar to move down.

Budget Overview Results										Customize   Find   View All		First 1-10 of 10 Last	
	Account	Description	Fund	Budget Unit	Description	Program	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
1	521000	Salaries	10	99999	Studies	60000	FY2009	267,624.00	130,475.40	0.00	0.00	137,148.60	51.25
2	521201	Other Compensation	10	99999	Studies	60000	FY2009	2,100.00	1,059.46	0.00	0.00	1,040.54	49.55
3	521500	Benefits	10	99999	Studies	60000	FY2009	65,388.00	29,200.76	0.00	0.00	36,187.24	55.34
4	522000	Travel	10	99999	Studies	60000	FY2009	21,717.00	1,587.93	4,544.00	0.00	15,585.07	71.76
5	532000	Xerox Copying	10	99999	Studies	60000	FY2009	50.00	0.00	0.00	0.00	50.00	100.00
6	537000	Telephone	10	99999	Studies	60000	FY2009	1,488.00	803.46	0.00	0.00	684.54	46.00
7	539000	Other Services	10	99999	Studies	60000	FY2009	0.00	0.00	0.00	0.00	0.00	0.00
8	540000	Supplies	10	99999	Studies	60000	FY2009	2,532.00	2,576.56	0.00	0.00	-44.56	-1.76
9	550000	Professional Services	10	99999	Studies	60000	FY2009	140,000.00	49,890.00	0.00	0.00	90,110.00	64.36
10	571000	Capital Outlay-Acq	10	99999	Studies	60000	FY2009	0.00	813.00	0.00	0.00	-813.00	0.00

Save Return to Search Notify Refresh

16. To see the transaction detail that is included in one of the summary amounts, click on the amount in the **Expense, Encumbrance, or Pre-Encumbrance** columns.
17. Click on the **Magnifying Glass** icon for any line item on which you wish to view additional details.
18. Click the **"OK"** button to return to the budget summary screen.
19. Click the scrollbar to move to the left.
20. Click the **"Return to Criteria"** link if you want to search for another budget unit's information.

Type of Calendar:	Detail Budget Period
Amounts in Base Currency:	USD
Revenue Associated	<input checked="" type="checkbox"/>
<a href="#">Return to Criteria</a>	Max Rows: <input type="text" value="100"/>

21. Click the **Home** button in the top right hand side of screen. This will return you to the Main Menu.

<a href="#">Home (FSPRD) - Production</a>
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