

SALISBURY UNIVERSITY

PROCEDURES: USING BUDGETS OVERVIEW TO FIND YTD SUMMARY INFORMATION

One of the main uses of PeopleSoft Financials will be to review department and project budgets. Budget Administrators and their designees have been assigned this capability.

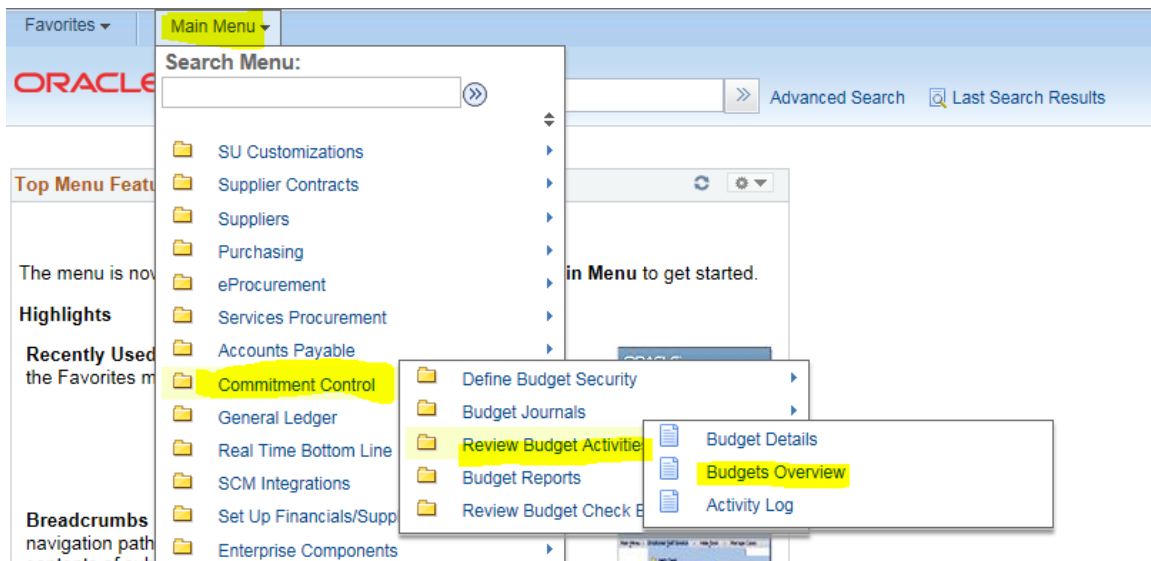
Budgets Overview is one way to review department and project budgets. The Budgets Overview page is the best option if the user is interested in getting their Control Budget, Detail Budget and itemized transactions at once.

Log in to Peoplesoft Financials using your normal GullNet username and password.

Link: finance.salisbury.edu

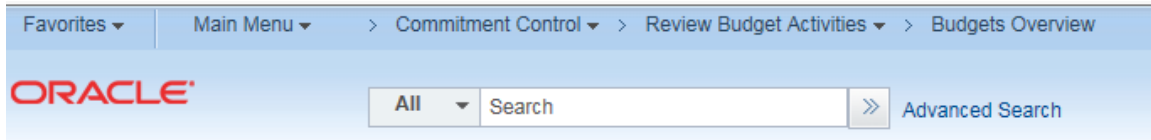
The navigation for this page is as follows:

Commitment Control > Review Budget Activities > Budgets Overview



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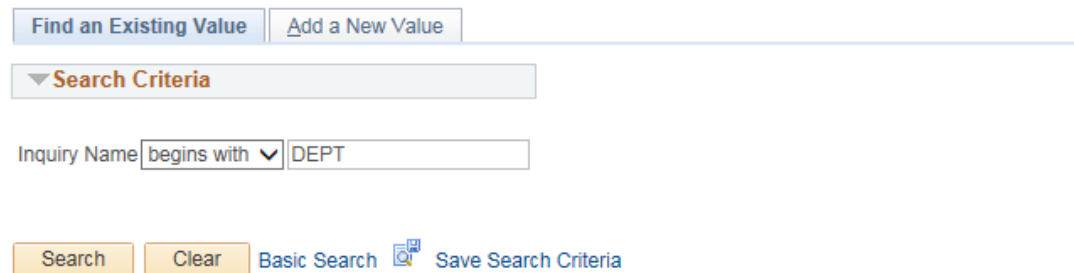
The following page will then appear.



The screenshot shows the Oracle navigation bar with the following elements: 'Favorites' dropdown, 'Main Menu' dropdown, a breadcrumb trail '> Commitment Control > Review Budget Activities > Budgets Overview', the Oracle logo, a search dropdown set to 'All', a search input field, a search button with a right-pointing arrow, and a link for 'Advanced Search'.

Budgets Overview

Enter any information you have and click Search. Leave fields blank for a list of all values.



The screenshot shows the search interface with two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs is a 'Search Criteria' dropdown menu. Underneath, there is an 'Inquiry Name' field with a dropdown menu set to 'begins with' and a text input field containing 'DEPT'. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search' (with a magnifying glass icon), and 'Save Search Criteria'.

[Find an Existing Value](#) | [Add a New Value](#)

When running processes or reports, PeopleSoft usually requires the user to create a process name (often called a **Run Control ID**). For Budgets Overview, PeopleSoft requires the user to create an Inquiry Name (the same concept, just a different name).

The user could decide to generically name the Inquiry, using **DEPT** (shown above) as the Inquiry Name or the user could name it for the number of the department (e.g., 155035) or project (e.g., Financial Services). A rule of thumb might be this: Use generic names if you have many departments/projects; use a specific name if you only have a few departments or projects.

To add a new Inquiry Name, select the **Add a New Value** tab. Enter the Inquiry Name and select **Add** .

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The following page appears:

Budget Inquiry Criteria
Budget Overview

Inquiry DEPT Description

Amount Criteria Search Clear Reset Ledger/Activity Log Integrity Act Log Internal Integrity

Budget Type

*Business Unit SALIS Ledger Group/Set Ledger Group Ledger Group

View Stat Code Budgets
 Display Chart

Time Span

*Type of Calendar Detail Budget Period

Budget Criteria Personalize Find View All First 1 of 1 Last

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

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
	%	%			Update/Add

Budget Status

- Open
- Closed
- Hold

Save Notify Refresh Add Update/Display

Enter the Ledger Group (**CC_DEPT** for department control budgets, **CC_PROJ** for project control budgets, **CC_DTL** for department/project detail expense budgets and **CC_DTL_REV** for department/project detail revenue budgets).

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Favorites ▾ Main Menu ▾ > Commitment Control ▾ > Review Budget Activities ▾ > Budgets Overview
 ORACLE All Search >> Advanced Search

Budget Inquiry Criteria
 Budget Overview

Inquiry DEPT Description

Amount Criteria Search Clear Reset Ledger/Activity Log Integrity Act Log Internal Integrity

Budget Type
 *Business Unit SALIS Ledger Group/Set Ledger Group Ledger Group CC_DTL
 View Stat Code Budgets Display Chart
 CC DETAIL EXP LEDGER GROUP

Time Span
 *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_DTL		<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	CC_DTL	BP	2019	2019	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/>	Update/Add
<u>Dept</u>	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/>	Update/Add
Fund	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/>	Update/Add
Program	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/>	Update/Add
<u>Project</u>	% <input type="text"/>	% <input type="text"/>	<input type="text"/>	<input type="text"/>	Update/Add

Budget Status
 Open
 Closed
 Hold

Save Notify Refresh Add Update/Display

Business Unit and Type of Calendar **must** have the values indicated for a departmental control budget inquiry for Salisbury University. Input the Department or Project number in the Department or Project chartfield from and to boxes. (**Note:** If you were using a generic Inquiry Name, simply change the Dept value to another department. If you prefer not to have to change values within the Inquiry Name, create specific Inquiry Names unique to each department or project.)

Select Save .

To run the budget inquiry, select Search at the top of the page.

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If you see the message below, click OK.

Message

More rows are available. The number of rows retrieved exceeds the Maximum Row criteria. (18021,342)

The number of selected rows exceeds the Max Rows criteria. Modify your selection criteria or increase the Max Rows criteria.

OK

Update the Max Rows to 99999 and click Search.

Return to Criteria Max Rows Display Options **Search**

Ledger Totals (100 Rows)

The following page appears:

Favorites > Main Menu > Commitment Control > Review Budget Activities > Budgets Overview Home | V

ORACLE All Search >> Advanced Search

Inquiry Results

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

Return to Criteria Max Rows Display Options **Search**

Ledger Totals (3 Rows)

Budget	2,324,106.00	Net Transfers	0.00
Expense	42,974.59		
Encumbrance	15,172.60		
Pre-Encumbrance	0.00		
Budget Balance	2,265,958.81		
Associate Revenue	0.00		
Available Budget	2,265,958.81		

Budget Overview Results Personalize | Find | View All | | | First 1-3 of 3 Last

	Ledger Group	Account	Account Description	Fund	Fund Code Description	Dept	Department Description	Program	Program Code Description	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent Available
1	CC_DEPT	010001	Object 01 Control Budget	4010	Unrestricted Education&General	155035	Financial Services	00601	Institutional Support-Admin	2019	2,208,155.00	31,568.37	0.00	0.00	2,176,586.63	98.57%
2	CC_DEPT	020001	Object 02 Control Budget	4010	Unrestricted Education&General	155035	Financial Services	00601	Institutional Support-Admin	2019	30,517.00	640.64	0.00	0.00	29,876.36	97.90%
3	CC_DEPT	030001	Objects 03-13 Control Budget	4010	Unrestricted Education&General	155035	Financial Services	00601	Institutional Support-Admin	2019	85,434.00	10,765.58	15,172.60	0.00	59,495.82	69.64%


Return to Criteria *Notes

Save Notify Refresh

The results identify the commitment control accounts, the budget amounts, encumbrance totals, expenses and the balance available.

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INFORMATION

All of the budget, encumbrance and expense totals are hyperlinked (i.e., underlined in blue) to allow the user to drill down into the detail that comprises the total. Clicking on the linked amounts takes the user to the Activity Log page.

The  icon directs the user to the Budget Details page.