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.

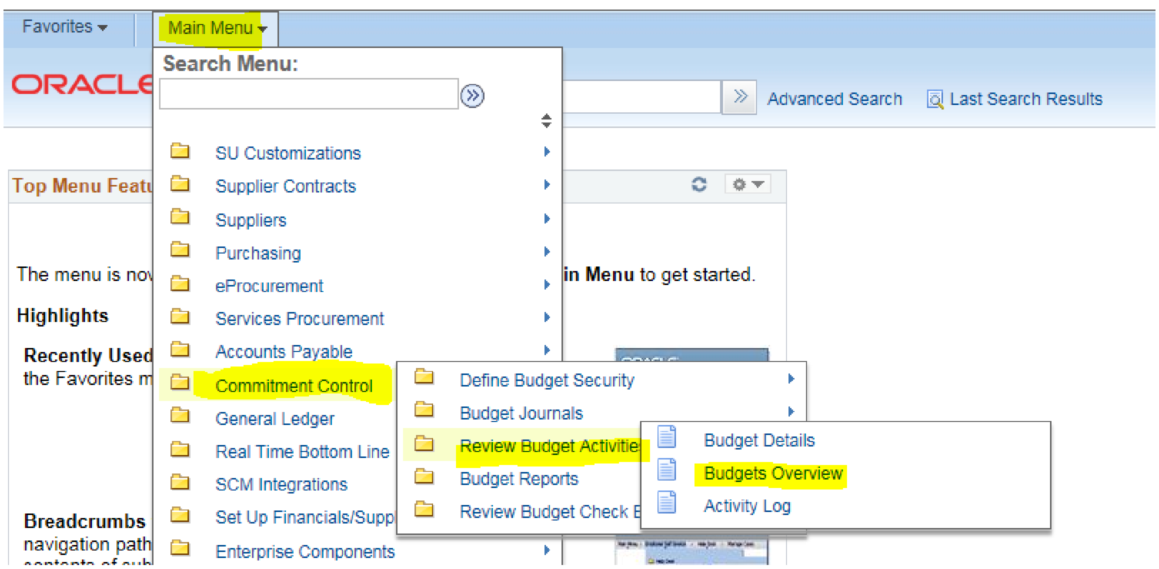
Budgets Overview is one way to review department and project budgets. The Budgets Overview page is the best option if the user is interested in getting their Control Budget, Detail Budget and itemized transactions at once.

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

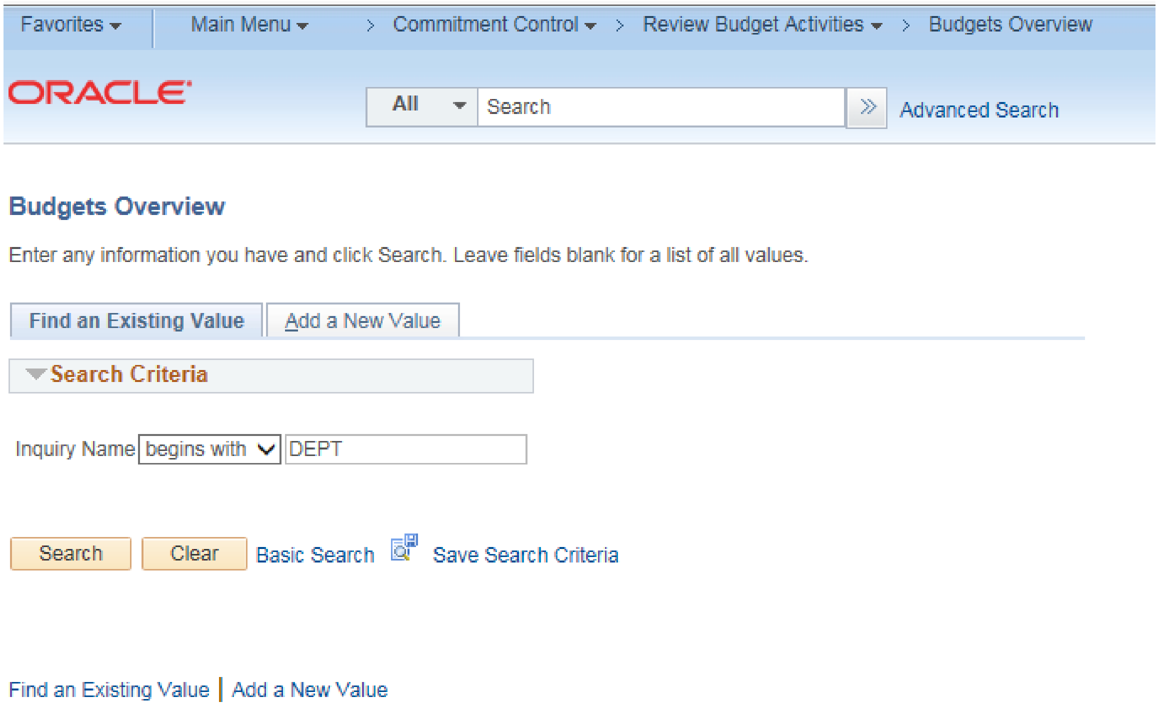
Link: finance.salisbury.edu

The navigation for this page is as follows:

Commitment Control > Review Budget Activities > Budgets Overview



The following page will then appear.

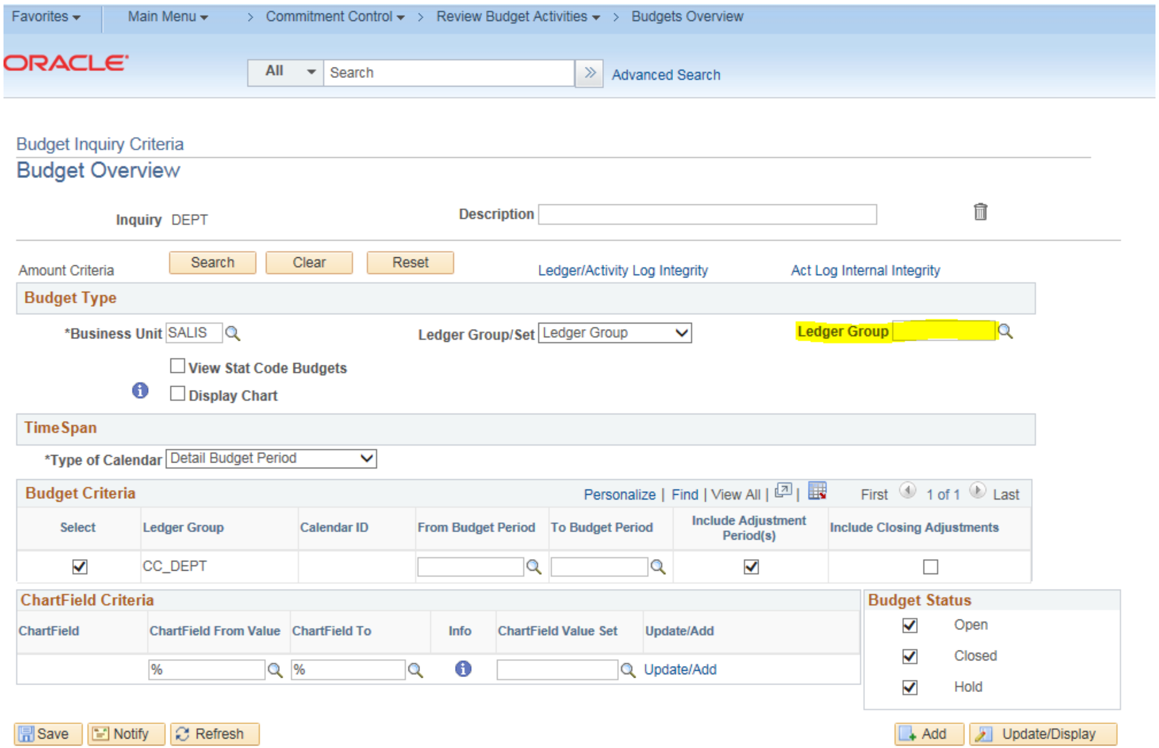


When running processes or reports, PeopleSoft usually requires the user to create a process name (often called a **Run Control ID**). For Budgets Overview, PeopleSoft requires the user to create an Inquiry Name (the same concept, just a different name).

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 .

The following page appears:



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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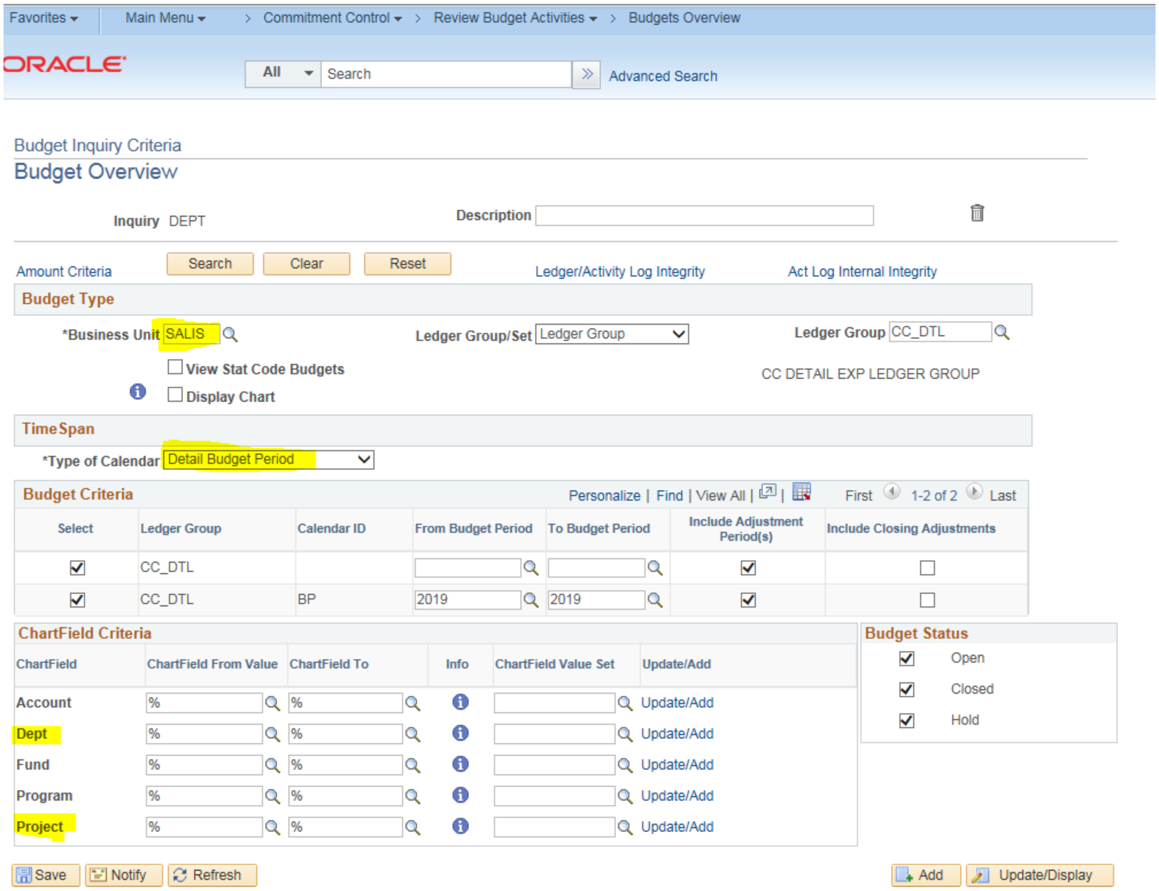

<u>Business Unit</u> and <u>Type of Calendar</u> **must** have the values indicated for a departmental control budget inquiry for Salisbury University. Input the Department or Project number in the Department or Project chartfield from and to boxes. (**Note**: If you were using a generic Inquiry Name, simply change the <u>Dept</u> 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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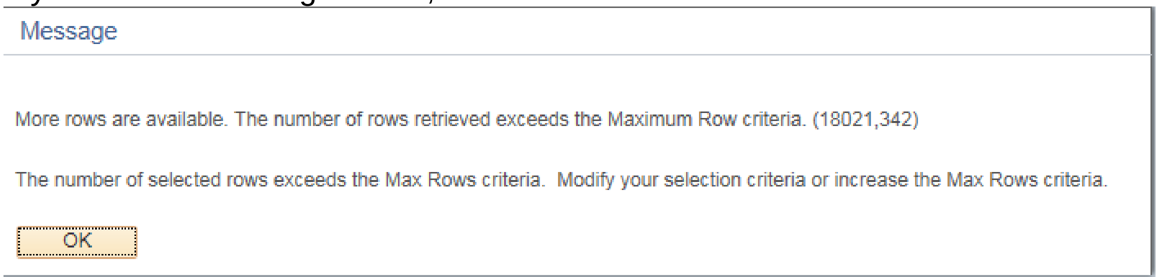
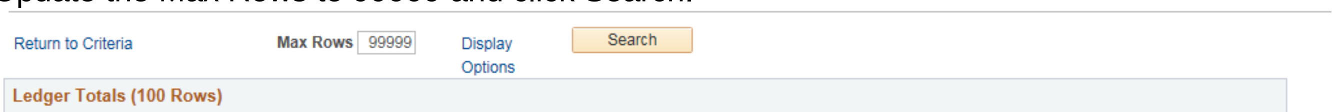
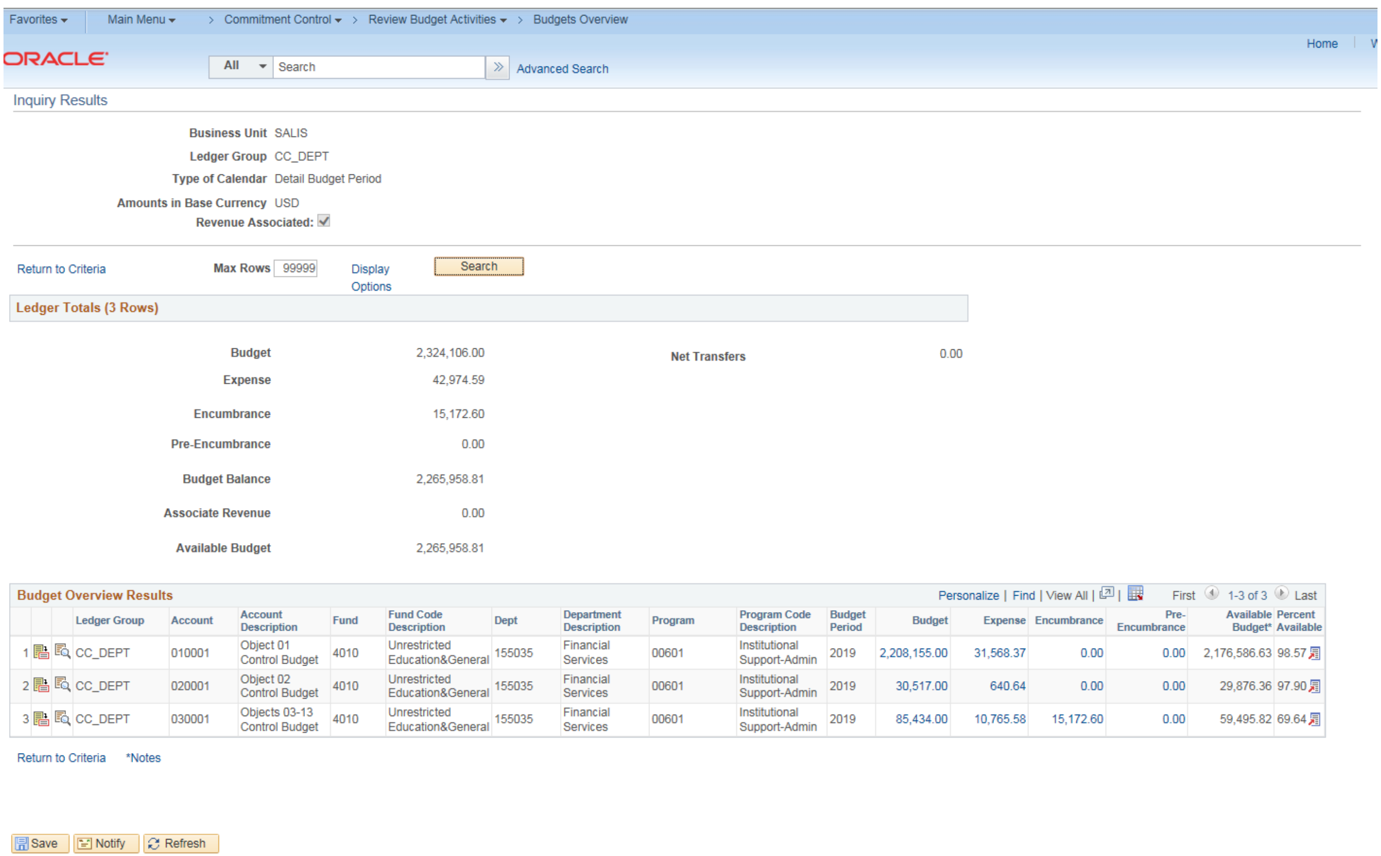
If you see the message below, click OK.



Update the Max Rows to 99999 and click Search.



The following page appears:



	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

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

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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.