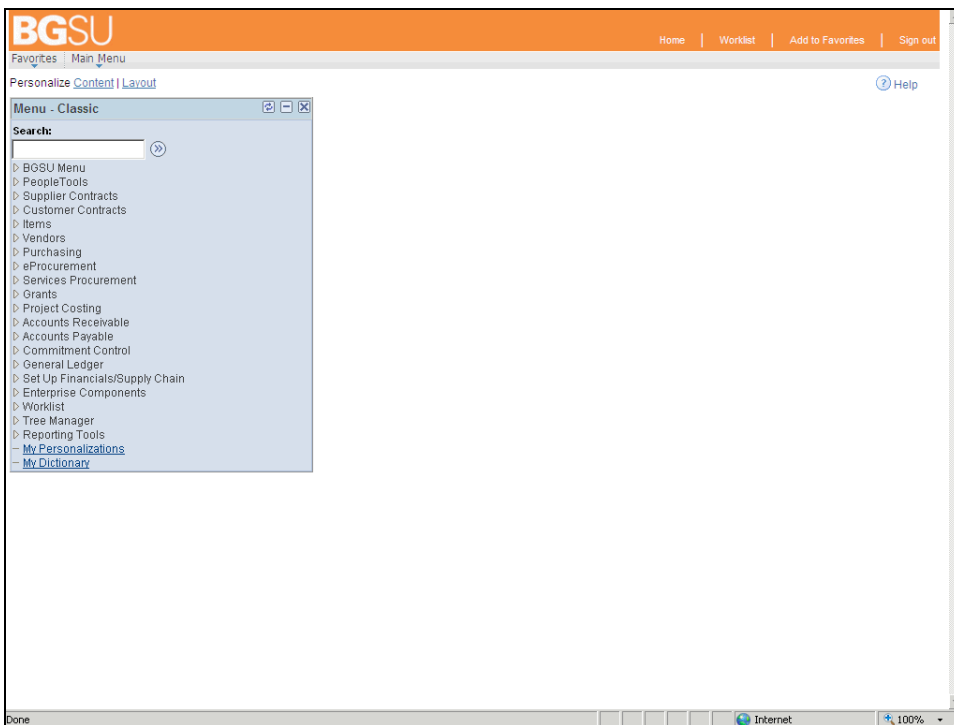


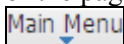

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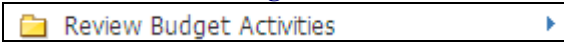

Creating a Budget Inquiry

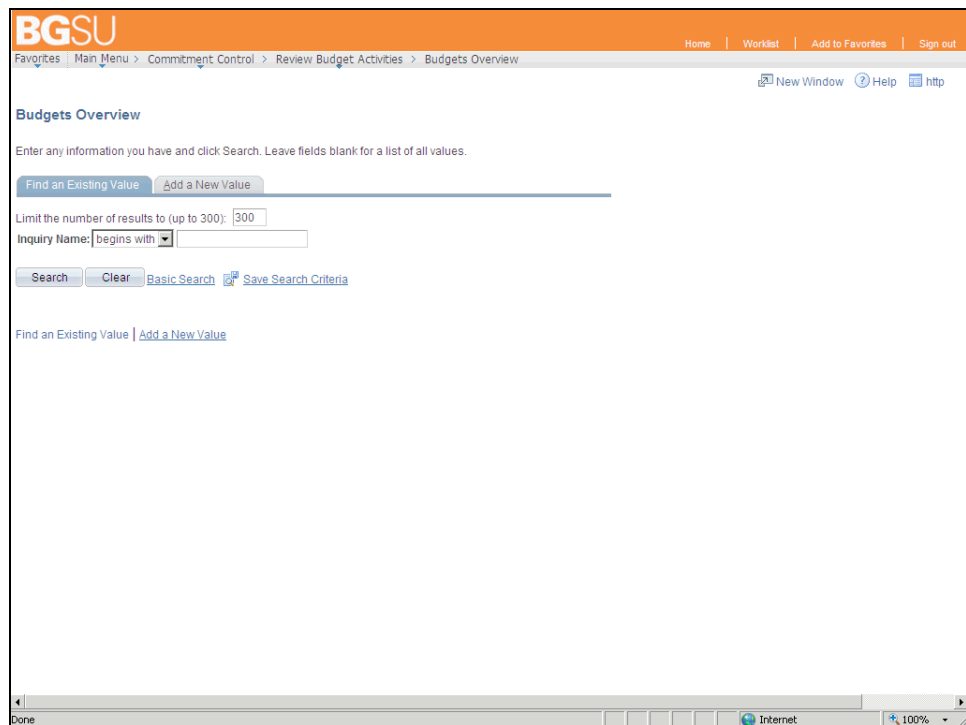
Procedure

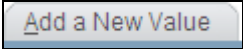

The first step in looking up your budget is to create a Budget Inquiry. You only have to create a Budget Inquiry one time. You then use that inquiry every time you want to view your budget. This exercise takes you through the steps of setting up a Budget Inquiry.

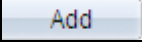





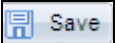
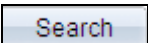

Step	Action
1.	<p>Begin navigating to the Budgets Overview component by opening the Main Menu.</p> <p>Click the Main Menu link found on the breadcrumbs at the top of the page.</p> 
2.	<p>"Commitment Control" found on the menu refers to controlling the financial commitments made by the university. Anything related to budgets will be found under Commitment Control.</p> <p>Click the Commitment Control menu.</p> 


Step	Action
3.	Options for inquiring about budget information are grouped under Review Budget Activities. Click the Review Budget Activities menu. 
4.	To look at the project/grant budget, go to the Budgets Overview. Click the Budgets Overview menu. 

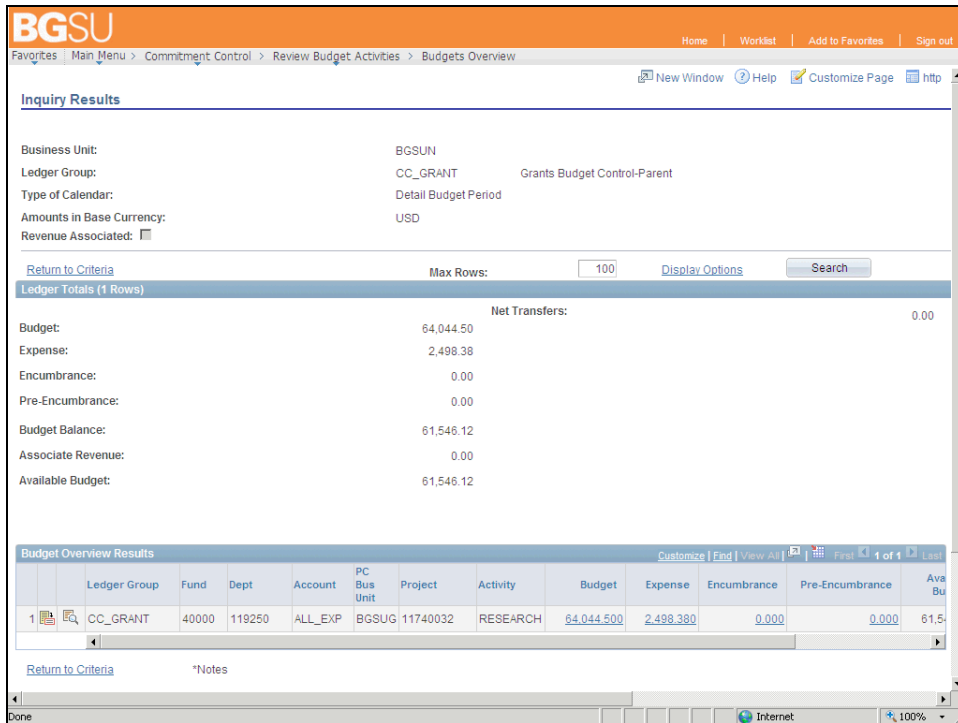


Step	Action
5.	The Budgets Overview component appears. You can retrieve a saved inquiry or create a new inquiry. In this lesson you will create a new inquiry. Click the Add a New Value tab. 
6.	The Budgets Overview - Add a New Value page is displayed. Click in the Inquiry Name field. 


Step	Action
7.	<p>You can name your inquiry anything that makes sense to you and that will help you to identify this particular inquiry. You will be creating what is called a <i>run control</i> in PeopleSoft. Run controls run a process that manipulates data. Whenever you do a search for created run controls, every run control you have created will be displayed.</p> <p>You may want to name this run control that shows you an overview of your budget something like BDGTOVRVW to distinguish it from other run controls. Run control names are limited to at most 10 characters and can contain only letters, numbers, and underscores; spaces and symbols are not allowed.</p> <p>For the purposes of this exercise, we are going to use the Project/Grant number as the inquiry name.</p> <p>Enter "11740032" into the Inquiry Name field.</p>
8.	<p>Click the Add button.</p> 
9.	<p>The Budget Inquiry Criteria page is displayed. The description field provides more explanation on the purpose of this Inquiry.</p> <p>Click in the Description field.</p> 
10.	<p>In this exercise you will use the description of the Project/Grant as the description of this budget inquiry.</p> <p>Enter "University Center Economic Dev" in the Description field.</p> <p>Remember you must enter the data <i>exactly</i> as it is shown in red with spaces, capitalization, punctuation, and so on entered precisely as shown.</p>
11.	<p>You must enter a Ledger Group.</p> <p>Click the Look up Ledger Group (Alt+5) button.</p> 
12.	<p>The ledger group to use for this grant is the Grants Ledger Group, CC_GRANT.</p> <p>Click the CC_GRANT link.</p>

Step	Action
13.	<p>The next step is to enter the Project number. The percent sign in the Project field is a wild card character, which you do not need. In order to select the percent sign, you need to double-click in the field.</p> <p>Double-click in the Project field.</p> 
14.	<p>The project number of the grant you will search for is 11740032.</p> <p>If you wanted to search on a range of project numbers, you could also enter a project number in the ChartField To Value column.</p> <p>Enter "11740032" into the Project field.</p>
15.	<p>Save the budget inquiry that you just created for later use.</p> <p>Click the Save button.</p> 
16.	<p>Clicking the Search button will display the results of the inquiry you just created.</p> <p>Click the Search button.</p> 
17.	<p>The Inquiry Results page is displayed. To see details for any of the account lines click the Show Budget Details button for that line.</p> <p>Click the Show Budget Details button.</p> 
18.	<p>The Budget Details page is displayed. In this example you can see that the available budget for this account number is \$61,546.12. The policy for BGSU is zero tolerance, meaning you cannot overspend your budget at all. This is why the Without Tolerance and With Tolerance figures are the same- there is no tolerance allowed for over-spending your budget.</p>
19.	<p>Once you have viewed the detail for your budget, return to the Inquiry Results page.</p> <p>First, you must scroll down to the bottom of the page.</p> <p>Click the scrollbar.</p>

Step	Action
20.	<p>After scrolling, you can return to the Inquiry Results page.</p> <p>Click the OK button.</p> 



The screenshot shows the BGSU Budgets Overview page. The top navigation bar includes 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. The breadcrumb trail is 'Favorites | Main Menu > Commitment Control > Review Budget Activities > Budgets Overview'. The page title is 'Inquiry Results'. Below the title, there are fields for 'Business Unit: BGSUN', 'Ledger Group: CC_GRANT', 'Type of Calendar: Detail Budget Period', and 'Amounts in Base Currency: USD'. There are also 'Return to Criteria' and 'Search' buttons. The 'Ledges Totals (1 Rows)' section shows a table with columns for Budget, Expense, Encumbrance, Pre-Encumbrance, Budget Balance, Associate Revenue, and Available Budget. The 'Budget Overview Results' section shows a table with columns for Ledger Group, Fund, Dept, Account, PC Bus Unit, Project, Activity, Budget, Expense, Encumbrance, Pre-Encumbrance, and Available Budget. The table contains one row of data for CC_GRANT, 40000, 119250, ALL_EXP, BGSUG, 11740032, RESEARCH, 64,044,500, 2,498,380, 0,000, 0,000, and 61,546,12.

Step	Action
21.	<p>You are brought back to the Inquiry Results page. Clicking the Sign out link signs you out of the system.</p> <p>Click the Sign out link.</p> 
22.	<p>If you are ready you can now take the qualifying Know It? assessment available with this lesson in Blackboard.</p> <p>End of Procedure.</p>