

## Creating a Budget Overview Inquiry

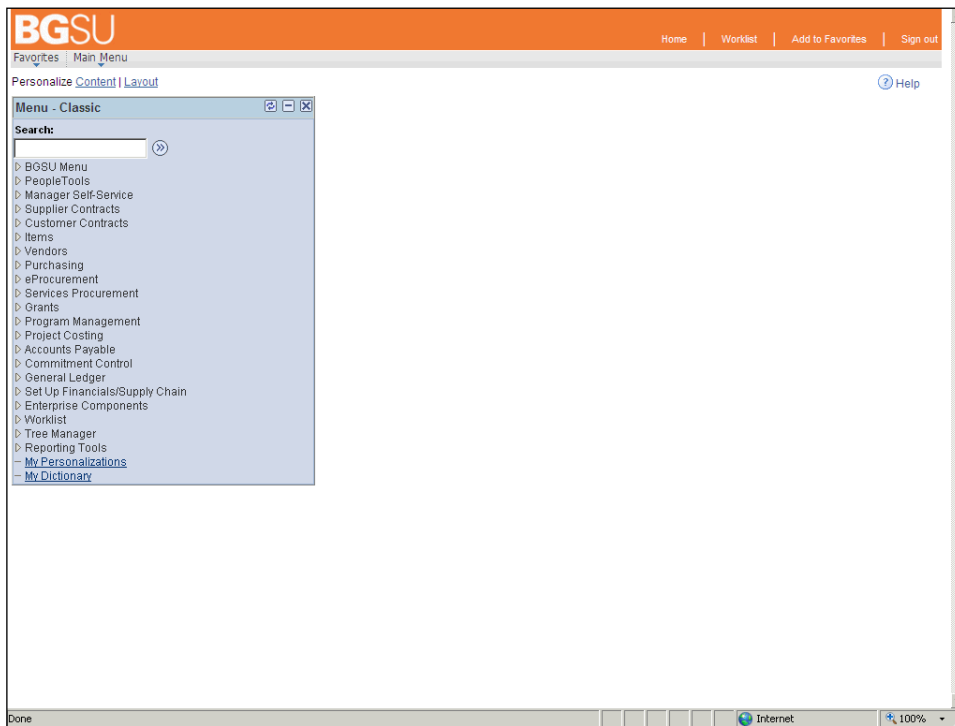
### Procedure


At the conclusion of this exercise, you will be able to view your department budget. In FMS the Budget Overview page provides a summary of your budget. In this exercise you are going to view the budget for the English Department.

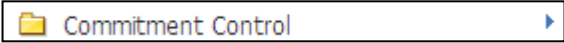
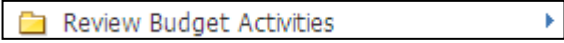

At the conclusion of this exercise you will be able to:

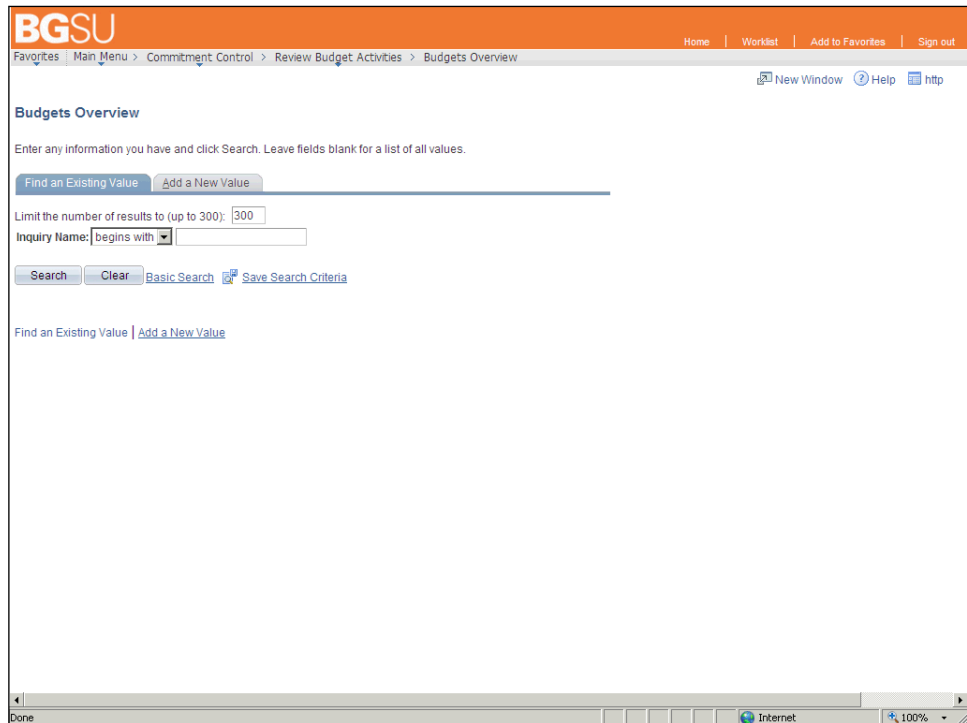
1. Add, name, and save a budget inquiry.
2. Select your budget inquiry criteria.
3. Access and view your operating account.

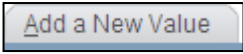
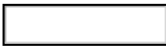
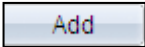

You may be asked to key in entries. You must key them in *exactly* as instructed with spaces, capitalization, punctuation and so on entered precisely as shown in **red**.



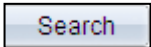



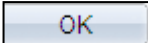
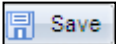
Step	Action
1.	Begin navigating to the <b>Budgets Overview</b> component by opening the <b>Main Menu</b> .  Click the <b>Main Menu</b> link. 

Step	Action
2.	<p><b>Commitment Control</b> found on the menu refers to controlling the financial commitments made by the university. Anything related to budgets will be found under <b>Commitment Control</b>.</p> <p>Click the <b>Commitment Control</b> menu.</p> 
3.	<p>Options for inquiring about budget information are grouped under <b>Review Budget Activities</b>.</p> <p>Click the <b>Review Budget Activities</b> menu.</p> 
4.	<p>To look at the department budget, go to the <b>Budgets Overview</b> component.</p> <p>Click the <b>Budgets Overview</b> menu.</p> 



Step	Action
5.	<p>The <b>Budgets Overview</b> search page appears. You can retrieve a saved inquiry or create a new inquiry. In this lesson you will create a new inquiry.</p> <p>Click the <b>Add a New Value</b> tab.</p> 
6.	<p>The <b>Budgets Overview - Add a New Value</b> page is displayed.</p> <p>Click in the <b>Inquiry Name</b> field.</p> 
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 an existing run control, 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 <i>BDGTOVRVW</i> to distinguish it from other run controls that you create. Run control names are limited to a maximum of 10 characters and can contain only letters, numbers, and underscores; spaces and symbols are not allowed.</p> <p>Enter "<b>English</b>" into the <b>Inquiry Name</b> field</p>
8.	<p>Entering "English" in the <b>Inquiry Name</b> text box names the inquiry for future use.</p> <p>Click the <b>Add</b> button.</p> 
9.	<p>The <b>Budget Inquiry Criteria - Budget Overview</b> page appears. You will enter your search criteria in this page.</p> <p>To further assist you identify this inquiry, you can enter a description in the <b>Description</b> field.</p> <p>Click in the <b>Description</b> field.</p> 
10.	<p>The purpose of the description field is to explain exactly what this Budget Inquiry is.</p> <p>Enter "<b>Department 110500</b>" into the <b>Description</b> field.</p>

Step	Action
11.	<p>The magnifying glass is a look up icon. Whenever you click a look up icon, a table listing possible options for that field are displayed.</p> <p>You have to select the proper department budgets. You can do this by accessing the look up table for the <b>Ledger Group</b> field.</p> <p>Click the <b>Look up Ledger Group (Alt+5)</b> button.</p> 
12.	<p>The possible Ledger Groups are displayed. To see a description of the Ledger Groups you will use most often, click the link below.</p> <p>Description of Ledger Groups</p> <p>For this tutorial, you are going to choose the <b>Pool Ledger Group</b> from the list.</p> <p>Click the <b>CC_LINE_AP</b> link.</p>
13.	<p>You need to indicate exactly which department budget you want to view.</p> <p>The % signs in the <b>Chartfield</b> fields are wildcard characters which need to be deleted. Double-clicking in the field will select the % sign so that it will be deleted.</p> <p>Double-click in the <b>Dept</b> field of the <b>ChartField From Value</b> column.</p> 
14.	<p>The English Department code is 110500.</p> <p>If you wanted to search on a range of Department codes you could also enter a Department code in the <b>ChartField To</b> column.</p> <p>Enter "<b>110500</b>" into the <b>Dept</b> field.</p>
15.	<p>Clicking the <b>Search</b> button will display the Budget Overview for department 110500.</p> <p>Click the <b>Search</b> button.</p> 
16.	<p>The <b>Inquiry Results</b> page is displayed. Here you see the total allocated budget along with an expense amount. When a General Ledger journal or Accounts Payable voucher is processed, the money becomes an expense against budget.</p>

Step	Action
17.	<p>In the <b>Budget Overview Results</b> table you may have one or many lines. Your budget will be set up as <i>all-expense</i> (operating, personnel, and fringes all together) or <i>fully-funded</i> (operating, personnel and fringes each separate). The <b>Show Budget Details</b> button allows you to see details on any one of the lines.</p> <p>Click the <b>Show Budget Details</b> button.</p> 
18.	<p>Look under the <b>Available Budget</b> line to see how much money is left in your budget.</p> <p>The FMS system is capable of having a tolerance built into your budget (i.e. a 10% tolerance would allow you to overspend your budget by 10%). BGSU's policy is 0% tolerance.</p> <p>Once the money in your budget has been spent you should not make any further purchases until money is transferred into the budget. This is why, under <b>Available Budget</b>, the amount for <b>Without Tolerance</b> and <b>With Tolerance</b> are the same: BGSU policy is 0% tolerance.</p>
19.	<p>Once you have viewed the detail for your budget, return to the <b>Inquiry Results</b> page.</p> <p>First, you must scroll down to the bottom of the page.</p> <p>Click the <b>scrollbar</b>.</p>
20.	<p>After scrolling, you can return to the <b>Inquiry Results</b> page.</p> <p>Click the <b>OK</b> button.</p> 
21.	<p>Now that you have created your budget inquiry, you need to save the inquiry so that you can use it the next time you want to view your budget.</p> <p>To access the <b>Save</b> button, scroll to the bottom of the page.</p> <p>Click the <b>scrollbar</b>.</p>
22.	<p>Save your budget inquiry.</p> <p>Click the <b>Save</b> button.</p> 

**BGSU** Home | Worklist | Add to Favorites | Sign out

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

Return to Criteria Max Rows: 100 Display Options Search

Ledger Totals (34 Rows)

Net Transfers: 115,981.00

Budget: 3,150,204.39  
 Expense: 208,738.39  
 Encumbrance: 0.00  
 Pre-Encumbrance: 0.00  
 Budget Balance: 2,941,466.00  
 Associate Revenue: 0.00  
 Available Budget: 2,941,466.00

Budget Overview Results Customize | Find | View All | First 1-34 of 34 Last

	Ledger Group	Fund	Dept	Account	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget*	Percent
1	CC_LINE_AP	10000	110500	51010	2011	2,019,984.880	158,467.920	0.000	0.000	1,863,516.940	
2	CC_LINE_AP	10000	110500	51020	2011	8,699.000	0.000	0.000	0.000	8,699.000	
3	CC_LINE_AP	10000	110500	51030	2011	128,000.240	0.000	0.000	0.000	128,000.240	
4	CC_LINE_AP	18600	110500	51230	2011	462.500	0.000	0.000	0.000	462.500	
5	CC_LINE_AP	18600	110500	51231	2011	40.000	0.000	0.000	0.000	40.000	
6	CC_LINE_AP	10000	110500	51260	2011	0.000	1,449.000	0.000	0.000	-1,449.000	
7	CC_LINE_AP	10000	110500	51270	2011	0.000	2,166.670	0.000	0.000	-2,166.670	
8	CC_LINE_AP	18600	110500	51550	2011	5,550.000	0.000	0.000	0.000	5,550.000	
9	CC_LINE_AP	10000	110500	51600	2011	3,100.000	0.000	0.000	0.000	3,100.000	
10	CC_LINE_AP	18600	110500	51600	2011	297.500	0.000	0.000	0.000	297.500	
11	CC_LINE_AP	10000	110500	51610	2011	500.000	0.000	0.000	0.000	500.000	

Step	Action
23.	<p>When you have finished creating a budget inquiry you can sign out of the system.</p> <p>Click the <b>Sign out</b> link.</p> <p><b>Sign out</b></p>
24.	<p>Congratulations!! You have finished this tutorial and now know how to create a Budget Overview Inquiry. The next tutorial shows you how to access the Budget Overview Inquiries that you create.</p> <p><b>End of Procedure.</b></p>