

Creating a Budget Overview Inquiry

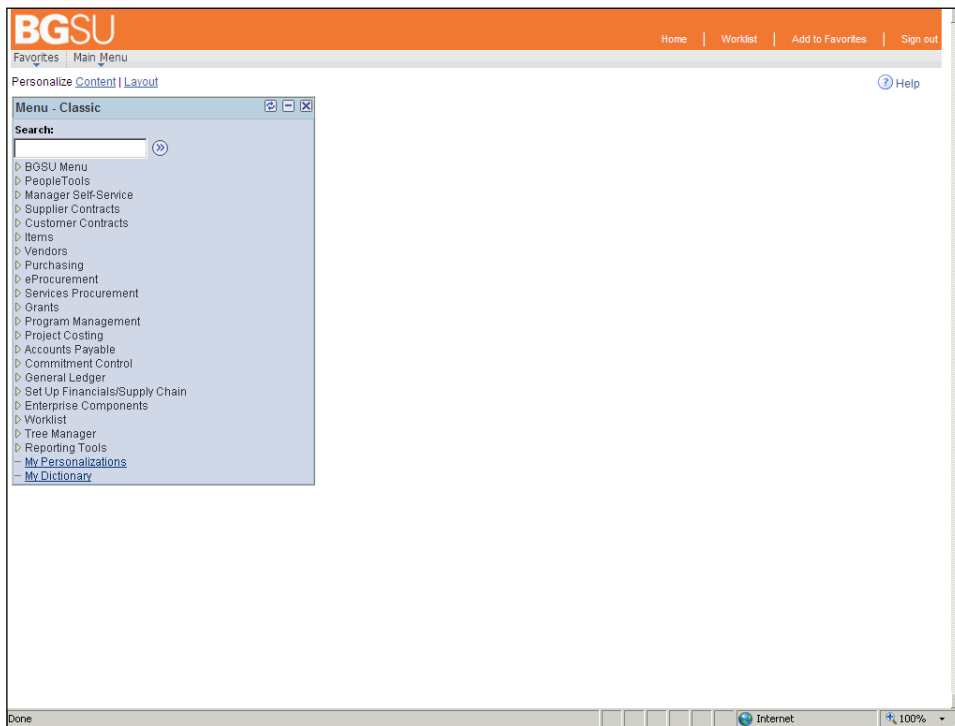
Procedure


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.


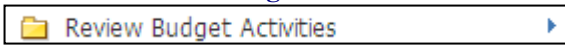
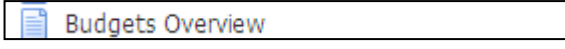
At the conclusion of this exercise you will be able to:

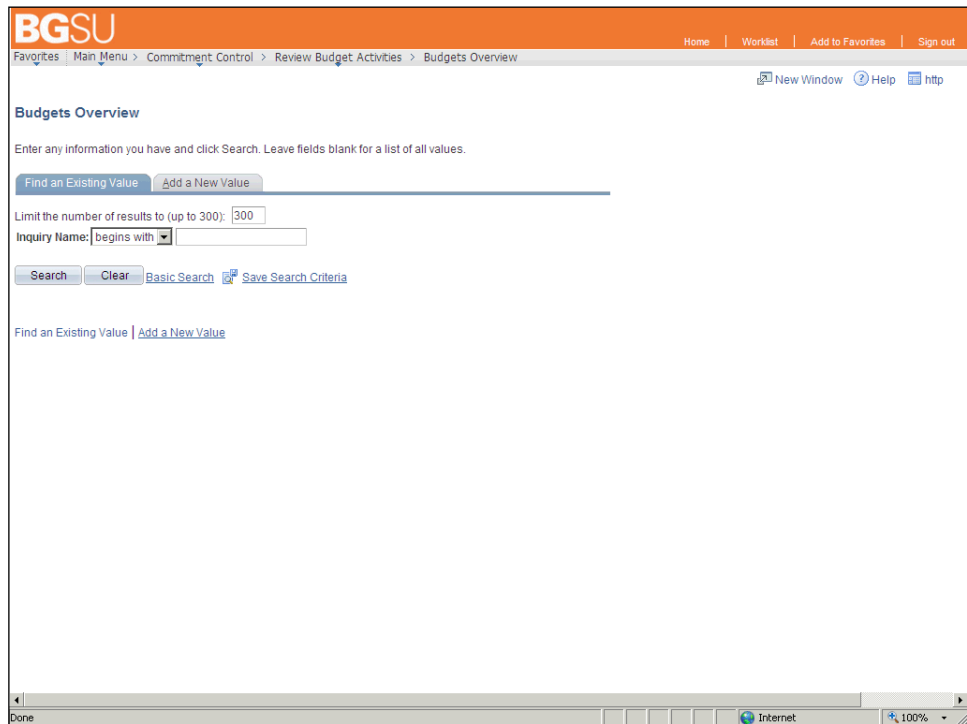
1. Add, name, and save a budget inquiry.
2. Select your budget inquiry criteria.
3. Access and view your operating account.

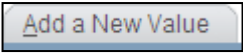
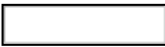
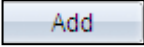

You may be asked to key in entries. You must key them in *exactly* as instructed with spaces, capitalization, punctuation and so on entered precisely as shown in **red**.



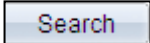



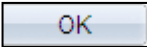
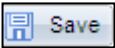
Step	Action
1.	Begin navigating to the Budgets Overview component by opening the Main Menu . Click the Main Menu link. 

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



Step	Action
5.	<p>The Budgets Overview 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 Add a New Value tab.</p> 
6.	<p>The Budgets Overview - Add a New Value page is displayed.</p> <p>Click in the Inquiry Name 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 "English" into the Inquiry Name field</p>
8.	<p>Entering "English" in the Inquiry Name text box names the inquiry for future use.</p> <p>Click the Add button.</p> 
9.	<p>The Budget Inquiry Criteria - Budget Overview 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 Description field.</p> <p>Click in the Description field.</p> 
10.	<p>The purpose of the description field is to explain exactly what this Budget Inquiry is.</p> <p>Enter "Department 110500" into the Description 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 Ledger Group field.</p> <p>Click the Look up Ledger Group (Alt+5) 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 Pool Ledger Group from the list.</p> <p>Click the CC_LINE_AP link.</p>
13.	<p>You need to indicate exactly which department budget you want to view.</p> <p>The % signs in the Chartfield 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 Dept field of the ChartField From Value 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 ChartField To column.</p> <p>Enter "110500" into the Dept field.</p>
15.	<p>Clicking the Search button will display the Budget Overview for department 110500.</p> <p>Click the Search button.</p> 
16.	<p>The Inquiry Results 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 Budget Overview Results 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 Show Budget Details button allows you to see details on any one of the lines.</p> <p>Click the Show Budget Details button.</p> 
18.	<p>Look under the Available Budget 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 Available Budget, the amount for Without Tolerance and With Tolerance are the same: BGSU policy is 0% tolerance.</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>
20.	<p>After scrolling, you can return to the Inquiry Results page.</p> <p>Click the OK 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 Save button, scroll to the bottom of the page.</p> <p>Click the scrollbar.</p>
22.	<p>Save your budget inquiry.</p> <p>Click the Save 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](#)

Ledger Totals (34 Rows)

Budget:	3,150,204.39	Net Transfers:	115,981.00
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 | [Eng](#) | [View All](#) | [Print](#) | [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	2,019,984.860	156,467.920	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	

Internet 100%

Step	Action
23.	<p>When you have finished creating a budget inquiry you can sign out of the system.</p> <p>Click the Sign out link.</p> <p>Sign out</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>End of Procedure.</p>