

PeopleSoft Budget Overview Report

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Review Budget Activities

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Budget Details

Budgets Overview

Ledger Inquiry Set

Activity Log

Review Fund Source Allocations

Review Fund Source Activities

Set up Inquiry Name > click Add a New Value Tab

Budgets Overview

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

▼ Search Criteria

Inquiry Name

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Budgets Overview

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Inquiry Name

[Add](#)

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- 1. Create an inquiry name
- 2. Click Add

Hint: The Inquiry name is limited to 10 characters.

Fill out screen as shown below

Budget Inquiry Criteria

Budget Overview

Inquiry BUDGET Description Budget_Fund

Budget Type

*Business Unit Ledger Group/Set Ledger Inquiry Set

View Stat Code Budgets

TimeSpan

*Type of Calendar

Budget Criteria

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	CASHR	FA	<input type="text" value="2021"/>	<input type="text" value="2021"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	REVENUE	EA	<input type="text" value="2021"/>	<input type="text" value="2021"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Account	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Dept	<input type="text" value="2235"/>	<input type="text" value="2235"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Fund	<input type="text" value="22414"/>	<input type="text" value="22414"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Project	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="button" value="i"/>	<input type="text"/>	<input type="button" value="Update/Add"/>

Budget Status

<input checked="" type="checkbox"/>	Open
<input checked="" type="checkbox"/>	Closed
<input checked="" type="checkbox"/>	Hold

Click on Search at the top of the page when completed.

Click on account below

[New window](#) | [Help](#) | [Personalize Page](#)

Inquiry Results

Business Unit UND01
 Type of Calendar Detail Budget Period
 Amounts in Base Currency USD
 Revenue Associated:

[Return to Criteria](#)

Max Rows

[Display Options](#)

Ledger Totals (46 Rows)

Budget	2,762,004.00	Revenue Estimate	2,762,004.00
Expense	956,381.05	Recognized Revenue	876,188.37
Encumbrance	319,726.67	Available Budget	1,885,815.63
Pre-Encumbrance	0.00	Collected Revenue	0.00
Budget Balance	1,485,896.28	Uncollected Revenue (Rec-Coll)	876,188.37
Associate Revenue	0.00		

Budget Overview Results

	Details	Budget Transaction Types	Ledger Group	Account	Account Description	Fund	Fund Code Description	Dep
1			FNDDTL	500000	Expenses	22414	Maintenance - Parts	2235
2			FNDDTL	511000	Salaries-Regular - Benefitted	22414	Maintenance - Parts	2235
3			FNDDTL	512000	Salaries - Other	22414	Maintenance - Parts	2235
4			FNDDTL	513000	Temp-Salaries-NonBenefitted	22414	Maintenance - Parts	2235
5			FNDDTL	514000	Overtime	22414	Maintenance - Parts	2235

Hint: You will need to scroll to the far right to see the different links for budget, actual expenses, and encumbrance balances.



Click on the Encumbrance number to see the transactions

ent ion	Project	Project Description	Budget Period	Budget	Expense	Encumbrance	Pre-Enc
port			2021	2,800.00	0.00	0.00	
port			2021	0.00	0.00	0.00	
port			2021	1,000.00	0.00	0.00	
port			2021	500.00	0.00	0.00	
port			2021	300.00	2,875.34	15.67	
port			2021	1,180.00	0.00	0.00	

Click the icon to download the information into Excel

Activity Log

Ledger: FNDDTL_ENC
 Display open encumbrances only

Activity Log



	Tran Line	Document Label	Document ID	Ref Bdgt?	Account	Fund	Dept	Project
	2	Voucher ID:	V3206582	Y	535000	22414	2235	
	4	Voucher ID:	V3206582	Y	535000	22414	2235	
	6	Voucher ID:	V3206582	Y	535000	22414	2235	
	2	Voucher ID:	V3206641	Y	535000	22414	2235	
	4	Voucher ID:	V3206641	Y	535000	22414	2235	