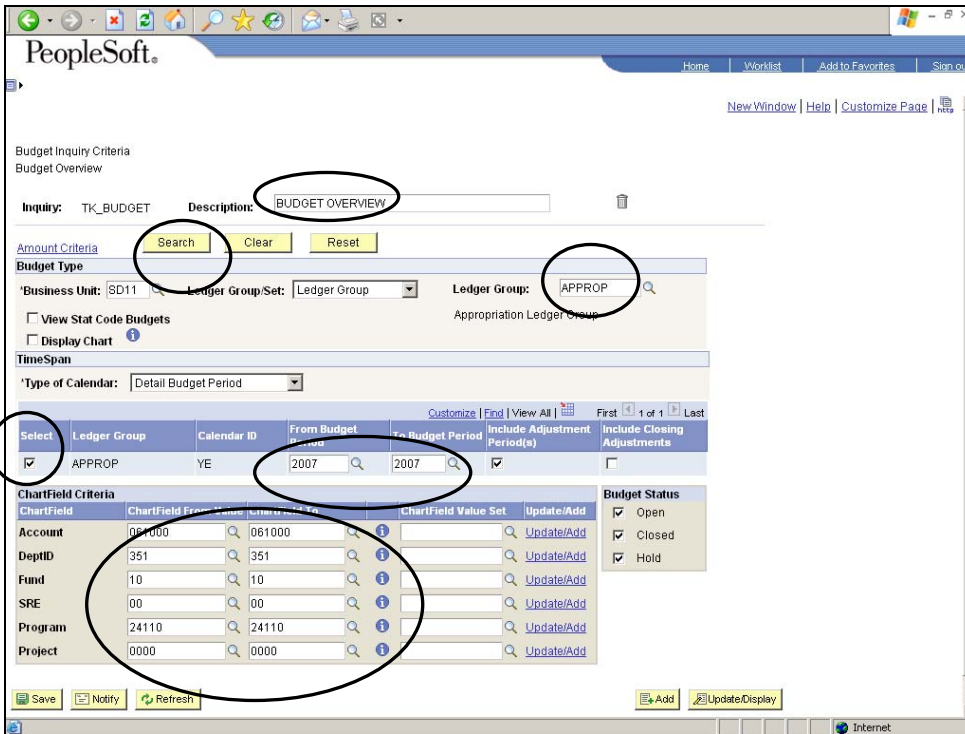


Go to:
Commitment Control,
Review Budget Activities,
Budgets Overview Link

“Add A New Value” or “Find an Existing Value” for your Inquiry name.



Enter all fields where shown - **Description, Ledger Group, Budget Period;** Be sure you have a “check mark” in the Select box (once you have filled in the Budget Period, the Chartfield Criteria boxes will open).

Fill the **Chartfield values.** Please try not to be too “broad” – the values field on the left is all that *needs* to be filled in at this time.

Click on the “Search” button

PeopleSoft. Inquiry Results Budget Overview

Business Unit: SD11
 Ledger Group: APPROP Appropriation Budget
 Type of Calendar: Detail Budget Period
 Amounts in Base Currency: USD
 Revenue Associated

Return to Criteria Max Rows: 100 Display Options Search

Ledger Totals (1 Rows)

Budget:	21,965.00	Net Transfers:	0.00
Expense:	109.00		
Encumbrance:	0.00		
Pre-Encumbrance:	0.00		
Budget Balance:	21,856.00		
Associate Revenue:	0.00		
Available Budget:	21,856.00		

Budget Overview Results

	Fund	DeptID	SRE	Program	Account	Project	Budget Period	Budget	Expense	Encumbrance	Available Budget*
1	10	351	00	24110	061000	0000	2007	21,965.00	109.00	0.00	21,856.00

This page shows you the *Summary* of the account.

To retrieve more information, click on the actual amount link.

For this users manual, I will select the "Expenses" link to retrieve details...

PeopleSoft. Activity Log

Ledger: APPROP_EX

Activity Log

Tran Line	Document Label	Document ID	Ref Bdgt?	Fund	DeptID	Program	Account	Project	Budget Period	Monetary Amount	Tran ID	Tran Date
1	Voucher ID:	00232248	N	10	351	24110	061000	0000	2007	109.00	0000600369	07/03/2006

OK

This will give you the Document ID (in this case, a voucher) and the date. Now to get more details, click on that magnifying glass!

PeopleSoft. Payables Voucher Line Drill Down

Transaction Line Identifiers

Business Unit: SD11 Voucher ID: 00232248
 Voucher Line: 1 Distribution Line: 1

Additional Source Information

Invoice Number: DOHERTY HIGH 06-07 SUPPORT
 Vendor Name: 1833

Transaction Line Details

Fund Code	Department	SRE	Program Code	Account	Project
10	351	00	24110	061000	0000

Line Status: Valid
 Budget Date: 07/03/2006
 Line Amount: 109.00 USD

OK

Information about the line – the Voucher ID number, the Invoice Number, Vendor *Number*, the Chartfield used, and the dollar value amount all show here – if you have questions about a *voucher*, you can contact the Accounts Payable office with the voucher id for details.

Now you can click on the "OK" button to return for more data information.

The screenshot shows the PeopleSoft Budget Overview page. At the top, the PeopleSoft logo is visible. Below it, there are navigation links: Home, Worklist, Add to Favorites, and Sign out. The main content area includes:

- Inquiry Results:** Budget Overview
- Business Unit:** SD11
- Ledger Group:** APPROP Appropriation Budget
- Type of Calendar:** Detail Budget Period
- Amounts in Base Currency:** USD
- Revenue Associated:**

Below this information, there are links for [Return to Criteria](#), [Display Options](#), and a [Search](#) button. A section titled **Ledger Totals (1 Rows)** contains the following data:

Budget:	21,965.00	Net Transfers:	0.00
Expense:	109.00		
Encumbrance:	0.00		
Pre-Encumbrance:	0.00		
Budget Balance:	21,856.00		
Associate Revenue:	0.00		
Available Budget:	21,856.00		

Below the ledger totals is the **Budget Overview Results** table. It has columns for Fund, DeptID, SRE, Program, Account, Project, Budget Period, Budget, Expense, Encumbrance, and Available Budget. The first row of data is:

	Fund	DeptID	SRE	Program	Account	Project	Budget Period	Budget	Expense	Encumbrance	Available Budget*
1	10	351	00	24110	061000	0000	2007	21,965.00	109.00	0.00	21,856.00

An annotation box with a black border and white background is positioned in the upper right quadrant of the screenshot. It contains the text: "Encumbrances can be reviewed in the same manner, by clicking on the link with the amount under *encumbrances*, you will be able to retrieve information about PO's!". A black arrow points from the bottom of this box to the "Encumbrance" column header in the table above, which is circled in red.

At the bottom of the page, there are buttons for [Save](#), [Notify](#), [Refresh](#), [Add](#), and [Update/Display](#).

If you would like more detailed information about your budget, you can run a Budget Transaction Detail report – directions begin on page 16 in this manual.

Any Procurement and Contracting staff member can answer questions about purchase orders, or you can contact Tina Koenig at 520.2174.

The Budget Office will answer questions about your budget information. Call Ken Wieck, 520.2293, or Becky Moore at 520.2029.