



Business Process Document
PS FIN Grants Suite Inquiries and Reports: Budget
Overview Inquiry

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Responsibility/Role	
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Budget Overview Inquiry

Trigger:

Required Field(s)	Comments

Output - Results	Comments

Additional Information

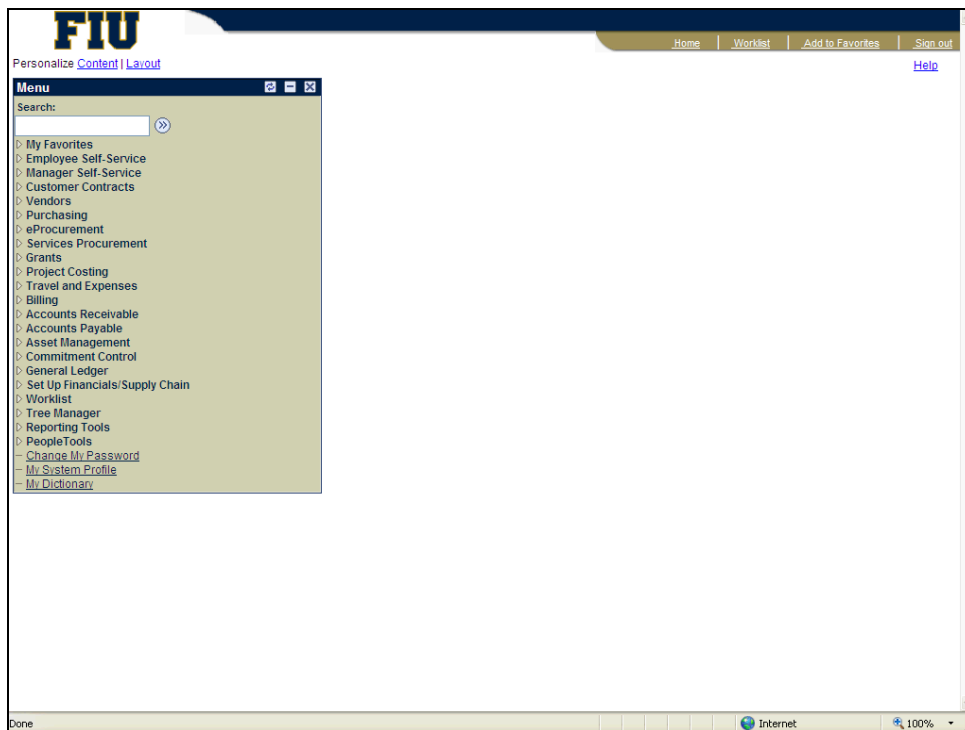
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PS FIN Grants Suite Inquiries and Reports: Budget Overview Inquiry



Procedure

The **Budget Overview Inquiry** tool provides an overview of the Budget Activity for one or multiple Project IDs.

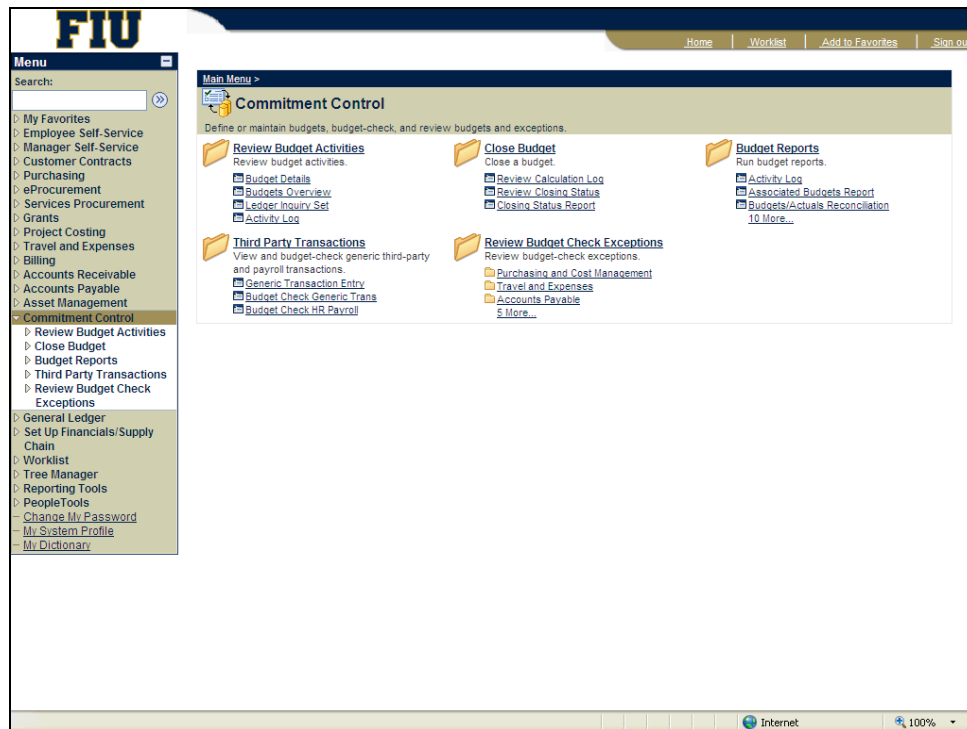


Step	Action
1.	Click the Commitment Control link. 



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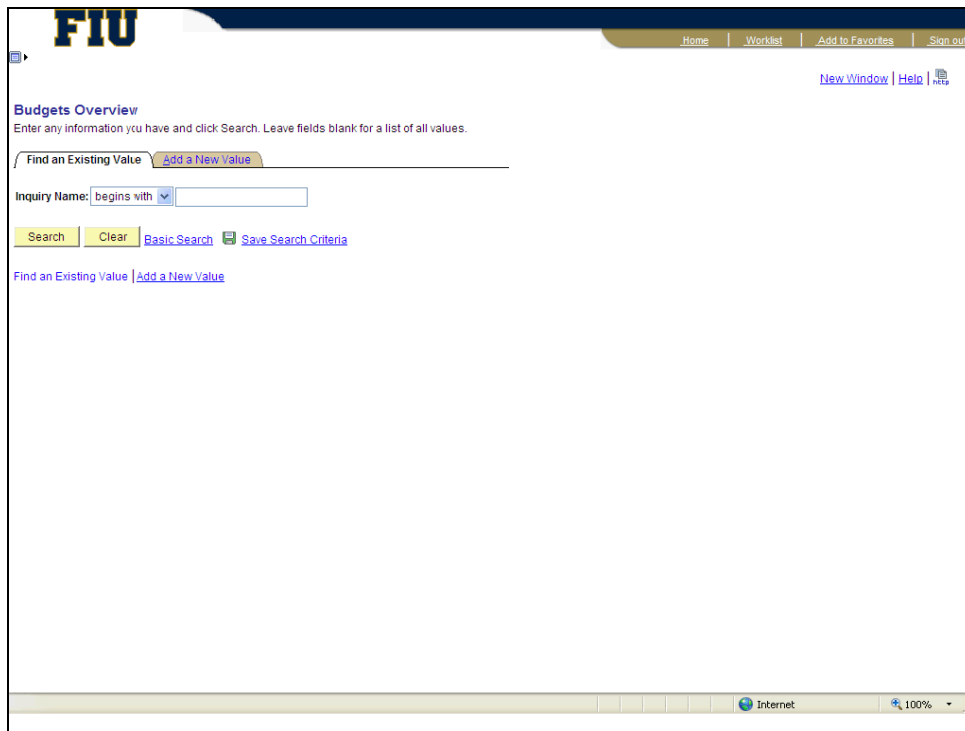
PS FIN Grants Suite Inquiries and Reports: Budget Overview Inquiry



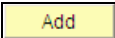


Step	Action
2.	Click the Review Budget Activities link. Review Budget Activities
3.	Click the Budgets Overview link. Budgets Overview
4.	Note: You will need to create a new inquiry as a result of the upgrade (by using the Add a New Value tab). The existing inquiries that you created prior to the upgrade will not reflect the correct amounts due to the addition of chartfields. Once you have created and saved the inquiry, you will no longer need to add a new inquiry. Instead, you can use the Find an Existing Value tab to retrieve the new Inquiry you created.

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Step	Action
5.	Click the Add a New Value tab. 
6.	Click in the Inquiry Name field. 
7.	Enter the desired information into the Inquiry Name field. For example enter " Overview ".
8.	Click the Add button. 



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Budget Inquiry Criteria

Budget Overview

Inquiry: OVERVIEW Description:

Amount Criteria

Budget Type

*Business Unit: Ledger Group/Set: Ledger Group:

View Stat Code Budgets
 Display Chart

Time Span

*Type of Calendar:

Customize | Find | View All | First | of | Last

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	CC_PG	AL	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	ChartField Value Set	Update/Add
Account	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Dept	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Fund	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Class	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Program	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Bud Ref	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
PC Bus Unit	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text"/>	<input type="button" value="Update/Add"/>
Project	<input type="text" value="%"/>	<input type="text" value="%"/>	<input type="text"/>	<input type="button" value="Update/Add"/>

Budget Status

Open
 Closed
 Hold

Step	Action
9.	Click in the Description field. <input type="text"/>

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
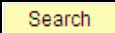


Step	Action
10.	Enter the desired information into the Description field. Enter " My Inquiry ".
11.	Note: Adding a meaningful description will be helpful when multiple Inquiry names have been created.
12.	Click in the Ledger Group field. <input type="text"/>
13.	Enter the desired information into the Ledger Group field. Enter " CC_PG ".
14.	Click the Look up Ledger Group (Alt+5) button. <input type="button" value="🔍"/>
15.	Click the CC_PG link. CC_PG



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Step	Action
16.	<p>Note: The From Budget Period and To Budget Period will be automatically populated with a value of 'ALLPER' once you have selected the Ledger Group value of 'CC_PG'. These values should be left to show the current available balance for the project ID. If you would like to drill down on the Expense, Encumbrance, and Pre-Encumbrance detail for transactions that occurred prior to 7/1/2009, you will need to remove the 'ALLPER' values from both fields.</p> <p>This search will display additional rows in the results for the old chartfield strings associated with the project ID which were zeroed out (for Expenses and Encumbrances) during the Grants implementation in order to add the department as well convert the fund.</p>
17.	Click the scrollbar to scroll the screen down to display additional field.
18.	Click in the Project field. <input data-bbox="370 793 537 825" type="text" value="%"/>
19.	Enter the desired information into the Project field. Enter " 800000001 ".
20.	Click the ChartField From Value button. 
21.	Click an entry in the Project column. <input data-bbox="370 1010 475 1041" type="text" value="800000001"/>
22.	Click the Save button. 
23.	Click the Search button. 
24.	Note: An overview of the Project ID's budget is displayed, including Total Budget, Expense, Encumbrance, Pre-Encumbrance, and Available Budget.

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Inquiry Results
Budget Overview

Business Unit: FIU01
 Ledger Group: CC_PG CC Project/Grant
 Type of Calendar: Detail Budget Period
 Amounts in Base Currency: USD
 Revenue Associated

[Return to Criteria](#) Max Rows: [Display Options](#)

Ledger Totals (7 Rows)

Budget:	119,367.28	Net Transfers:	0.00
Expense:	0.00		
Encumbrance:	0.00		
Pre-Encumbrance:	0.00		
Budget Balance:	119,367.28		
Associate Revenue:	0.00		
Available Budget:	119,367.28		

Budget Overview Results Custom



	Ledger Group	Account Dept	Class	Fund	Program	Bud Ref	PC Bus Unit	Project	Activity	Budget Period	Budget	Expense E
1	CC_PG	F71121 202050000	1	661	22		FSR01 800000001	SPN	ALLPER		1,000.00	0.00
2	CC_PG	F71190 202050000	1	661	22		FSR01 800000001	SPN	ALLPER		3,730.50	0.00
3	CC_PG	F72100 202050000	1	661	22		FSR01 800000001	SPN	ALLPER		6,500.00	0.00

Step	Action
25.	Click the scrollbar to scroll the screen down to display additional fields.
26.	<p>Note: A row for each budgetary account associated to the Project ID will be displayed. You will also see the following details:</p> <ul style="list-style-type: none"> - Class - Fund - Program - PC Business Unit - Project # - Activity
27.	Click the scrollbar to scroll the screen to the right to displays additional fields..
28.	<p>Note: This page displays more information about each Budgetary Account including information such as:</p> <ul style="list-style-type: none"> - Budget - Expenses - Pre-Encumbrance - Available Budget - Percent Available



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Step	Action
29.	Click the scrollbar to scroll the screen back to the left to display the Budget Overview Results page. 
30.	Click the Home link. 
31.	Congratulations. You successfully ran an inquiry for Budgets Overview Inquiry End of Procedure.