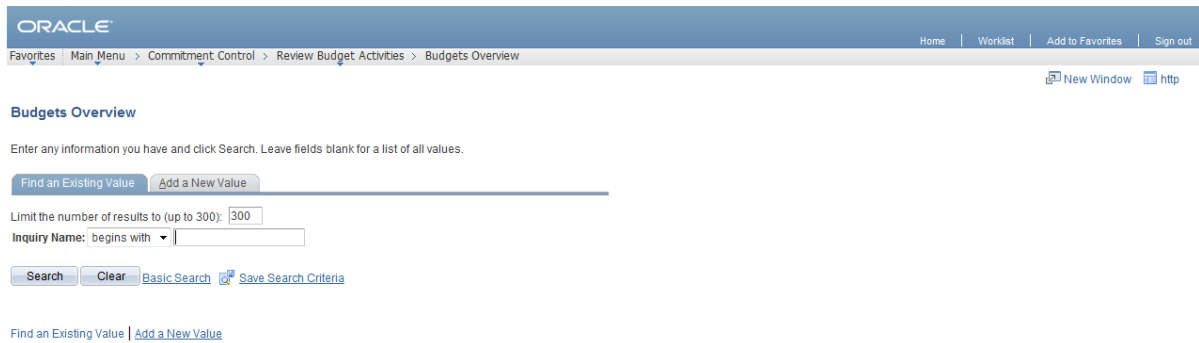


# How to Utilize Budgets Overview for Grants in PS 9.1

## Using Budgets Overview to find Grant Budget Information

Utilizing the budget overview feature in PeopleSoft will allow you see the status of your grant budget; it is a tool that can be used when looking up something quickly. It is like a querying page where you will enter certain information like your grant ID to look up the budget information. The overview can be seen by following these steps.

1. Navigate to **Commitment Control** and then click on **Budgets Overview**.



ORACLE

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

Home | Worklist | Add to Favorites | Sign out

New Window http

### Budgets Overview

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

Find an Existing Value Add a New Value

Limit the number of results to (up to 300): 300

Inquiry Name: begins with

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

2. Click the **Search** button to select a saved inquiry.

**Note:** If you do not have an existing Inquiry (or Run Control) you will have to create one by clicking on the **Add a New Value** tab. Give your Run Control a name. **A suggestion is that you enter the name of your grant and/or grant ID then click ADD.** You can create as many Run Controls as you would like (one for each grant if you like), but you can also just keep one and change the criteria each time.

3. After clicking Search, if you have more than one Inquiry, your saved inquiries will appear. Select an inquiry under the **Inquiry Name** column to select which inquiry you want to use. If you only created one inquiry, you will not have anything to select from the system takes directly to your criteria.

### Search Results

View All	First	1-4 of 4	Last
Inquiry Name	Description		

# How to Utilize Budgets Overview for Grants in PS 9.1

4. Your inquiry criteria now appear.

5. To view **BOTH EXPENSE AND REVENUE BUDGETS TOGETHER** select the following:

- Select **LEDGER INQUIRY SET** for the Ledger Group/Set.
- Click the **Look up Ledger Inquiry set** button to return the list of ledger groups to choose from for your criteria.
- Then select **GRPJ\_RV\_EX** for the Ledger Inquiry Set.

6. To view **EXPENSE OR REVENUE BUDGETS ONLY** select the following:

- Select **Ledger Group** from the drop down box for your criteria.

Ledger Group/Set:

- Click the **Look up Ledger Group** button to return the list of ledger groups to choose from for your criteria. Select the ledger group you want to search on. You can select a GRNT\_BUD\_PA parent ledger to see summary, GRNT\_BUD\_PA child ledger to see detail, or GRT\_REV revenue ledger to see revenue.

Ledger Group:

7. Enter the **7-digit Grant ID** into the CHARTFIELD CRITERIA at the bottom of the page in the **GRT/PROJ field**. Note: % represents wildcard and can be removed when typing in the full value of Grant ID. You can also enter a specific Account if you so chose or 604% to bring up only Travel accounts.

8. Click  the **Search** button which is located at the TOP of the page.

# How to Utilize Budgets Overview for Grants in PS 9.1

9. The below results will be displayed when using the LEDGER INQUIRY SET which shows your child budgets for expense and revenues.

ORACLE Home

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

**Inquiry Results**

Business Unit: TOWSN

Type of Calendar: Detail Budget Period

Amounts in Base Currency: USD

Revenue Associated:

[Return to Criteria](#) Max Rows: 100 [Display Options](#)

**Ledger Totals (32 Rows)**

Budget:	278,319.00	Revenue Estimate:	278,319.00
Expense:	259,781.43	Recognized Revenue:	241,855.31
Encumbrance:	0.00	Available Budget:	36,463.69
Pre-Encumbrance:	0.00	Uncollected Revenue (Rec-Coll):	241,855.31
Budget Balance:	18,537.57		
Associate Revenue:	0.00		
Available Budget:	18,537.57		

**Budget Overview Results**

	Ledger Group	Fund	Dept	Account	Project	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget	Revenue Estimate
1	GRT_BUD_CH	5000	51612	502000	5040046	ALL	0.00	0.00	0.00	0.00	0.00	0.00
2	GRT_BUD_CH	5000	51612	502007	5040046	ALL	11,674.00	8,712.50	0.00	0.00	4,961.50	0.00
3	GRT_BUD_CH	5000	51612	502011	5040046	ALL	7,124.00	2,283.75	0.00	0.00	4,840.25	0.00
4	GRT_BUD_CH	5000	51612	502015	5040046	ALL	22,250.00	17,250.00	0.00	0.00	5,000.00	0.00
5	GRT_BUD_CH	5000	51612	502094	5040046	ALL	95.00	94.50	0.00	0.00	0.50	0.00

10. The below results will be displayed when using the LEDGER GROUP and GRNT\_BUD\_PA (PARENT EXPENSE BUDGET VIEW)

ORACLE Home

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

**Inquiry Results**

Business Unit: TOWSN

Ledger Group: GRT\_BUD\_PA GrantPrjcParent Control Bdgt

Type of Calendar: Detail Budget Period

Amounts in Base Currency: USD

Revenue Associated:

[Return to Criteria](#) Max Rows: 100 [Display Options](#)

**Ledger Totals (6 Rows)**

		Net Transfers:		0.0
Budget:	278,319.00			
Expense:	259,781.43			
Encumbrance:	0.00			
Pre-Encumbrance:	0.00			
Budget Balance:	18,537.57			
Associate Revenue:	0.00			
Available Budget:	18,537.57			

**Blue dollar amounts click to drill down further**

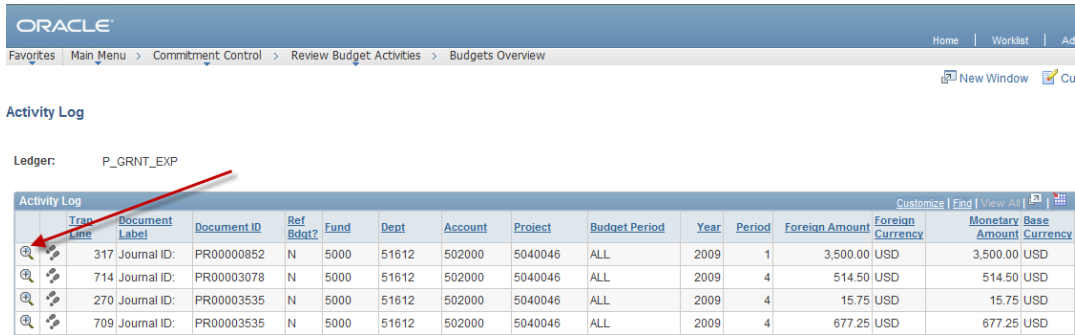
  

**Budget Overview Results**

	Ledger Group	Fund	Dept	Account	Project	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget	Percent Available
1	GRT_BUD_PA	5000	51612	502000	5040046	ALL	41,143.00	26,340.75	0.00	0.00	14,802.25	35.98
2	GRT_BUD_PA	5000	51612	502200	5040046	ALL	4,832.00	4,136.80	0.00	0.00	695.20	14.39
3	GRT_BUD_PA	5000	51612	502600	5040046	ALL	13,357.00	25,784.70	0.00	0.00	-12,427.70	-93.04
4	GRT_BUD_PA	5000	51612	502700	5040046	ALL	44,378.00	39,000.00	0.00	0.00	5,378.00	12.12

# How to Utilize Budgets Overview for Grants in PS 9.1

11. Click on any of the blue dollar amounts to drill down to details.
12. From the Activity Log page you can then click the + sign to get even more information if available.



Activity Log

Ledger: P\_GRNT\_EXP

Tran Line	Document Label	Document ID	Ref Bdat?	Fund	Dept	Account	Project	Budget Period	Year	Period	Foreign Amount	Foreign Currency	Monetary Amount	Base Currency
317	Journal ID:	PR00000852	N	5000	51612	502000	5040046	ALL	2009	1	3,500.00	USD	3,500.00	USD
714	Journal ID:	PR00003078	N	5000	51612	502000	5040046	ALL	2009	4	514.50	USD	514.50	USD
270	Journal ID:	PR00003535	N	5000	51612	502000	5040046	ALL	2009	4	15.75	USD	15.75	USD
709	Journal ID:	PR00003535	N	5000	51612	502000	5040046	ALL	2009	4	677.25	USD	677.25	USD

13. Click  to return to prior page.
14. Click on [Return to Criteria](#) to return to criteria page to enter different criteria if so desired.
15. End Procedure.

**NOTE: Budget overview does not give account description at this time, so you should know what account you are looking for or have a guide close by.**