How to Run the Budget Overview

Budget Overview allows users to view budgets and actuals without running a report. Run this query for valid open budget strings used for eProcurement requisitions, Travel Authorizations, etc. This query reports against single or multiple site budgets to display original allocations, expensed and encumbered amounts for the fiscal year.

1. Log in to PeopleSoft FIN, found here, with your six-digit Employee ID number and password.
2. Navigate to page:
   - Click NavBar.
   - Select Menu.
   - Select Commitment Control.
   - Select Review Budget Activities.
   - Select Budgets Overview.
3. Select Add a New Value tab (only during first time setup).
4. Enter a name in Inquiry Name.  
   **Note:** Do not use spaces or special characters. Use an underscore (_) to separate words, if necessary.
5. Click Add.

On the Budget Inquiry Criteria page:

6. Enter name in Description.
7. Enter EXPENSE in Ledger Group.

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8. The current fiscal year will populate in From and To Budget Period in Budget Criteria section. **Note:** Enter previous fiscal year(s) to view historical data.

9. In the Chartfield Criteria section, enter values to be searched for. **IMPORTANT!** If entering only one value per chartfield, enter it in the ChartField From Value column. If entering a range of values, use both the ChartField From and ChartField To columns.
   - Enter 1000 in Account “Chartfield From Value” and 7699 in Account “Chartfield To”.  
   - Enter four-digit department code in Dept, in both ChartField From Value and ChartField To.

10. Click **Save** for future use.  
**IMPORTANT!** Run query anytime to retrieve current data. Always keep values in the Account and Dept Chartfields the same.

11. Click **Search** to run query.

It will take several moments for results to appear.

**Inquiry Results page** will display both a Ledger Summary and Chartfield string details of the budget, adjustments, transfers, actual expenditures to date, and encumbrances.
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12. Notice the **Ledger Totals** section. Numbers represent the sum of the dollar amounts recorded against all the budgets that matches from, search criteria.

13. In **Budget Overview Results**, the individual budgets that meet the search criteria display. **Note:** By default, a description of each chartfield of the budget string is added in the Budget Results grid. Scroll horizontally to see full budget string data. The **Available Budget** for each will appear in the far right column.

14. Use the Grid Options Menu to hide the Description fields:

   - Select Personalize from **Grid Options menu**.
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- Select each description column to be hidden in **Column Order**, click the **Hidden toggle box**.
- Click **OK**.

Without description columns, Budget Overview Results display in a more compact way.

15. If desired, drill into the details of a line by clicking on the icons and hyperlinks associated with that line.

- **Show Budget Details** button will bring up budget details for the ledger row.
- **Budget Transaction Type** button displays various budget amounts.

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