PeopleSoft

Budget Overview

This report is used at a summary level. While you can drill down to some detailed transactions, it is most used to see the amount of funds available in a budget. You can also drill down to see the detailed transactions for your spending authority.
Budget Overview Instructions

The following URL will take you to the core PeopleSoft Financial system. You will log in using your PeopleSoft login and password.

https://fprod.gafirst.usg.edu

1. Once you’ve logged in, you’ll see some basic menu commands. To navigate to Budget Overview, click on Commitment Control > Review Budget Activities.
2. Click on Budgets Overview

3. First time users of this inquiry will need to set up a run control ID that will be used each time you inquire on an account. Click on the tab.

4. Type in a name for the inquiry, as shown in the screenshot below. Click the button. After the Run Control is initially created, you will click on the tab to select the run control and run the inquiry in the future. You will not need to create it again for future inquiries.

5. The screen for the Budget Overview will appear. First time users, will need to enter the following:
   a. Enter “Budget Overview” in the Description.
   b. In the Ledger Group select the appropriate Ledger Group Description.
      - APPROP for non-personal services
• ORG for personal services
• PROJ_GRT for projects and grants
c. Type of Calendar = Summary Accounting Period
d. Calendar ID = AN
e. From Year = Current Budget Year
f. From Period = 1
g. To Year = Current Budget Year
h. To Period = 1
i. ChartField Criteria Dept = Appropriate department ID (or grant ID for projects/grants)
j. Chartfield Criteria Bud Ref = Current Budget Year

6. Click the **Search** button.

7. The next screen shows you the detail. From here you may look at the budget details that established the current spending authority. You can also see additional detail for any number that is underlined and in blue font. If you click on the budget amount for an
account and fund, the next screen will be a listing of the individual budget journals that together add up to the budget amount shown.

8. This screen will also show the Available Budget for the particular chartstring.

9. Click “Return to Criteria to return to the main Budget Overview page to change any of the inquiry parameters.