Budget Overview Setup Instructions

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.

1. Navigate to the [GeorgiaFIRST Financials webpage](https://www.usg.edu/gafirst-fin/)
2. Select the GeorgiaFIRST Financials button (for Core Users)
3. If prompted, select the GoWest shield logo.
4. Login using your UWG Username and Password.
5. You will be prompted to dual authenticate using the Duo authentication method previously established.
6. From the PeopleSoft Financials homepage, select the NavBar (compass) icon.
7. Click the Navigator icon.
8. Click Commitment Control from the menu listing.

9. Click Review Budget Activities.
10. Click Budgets Overview.
11. First time users of this report will need to set up an Inquiry Name that will be used each time you inquire on an account. Click on the Add a New Value tab.

**Budgets Overview**

![Find an Existing Value | Add a New Value]

Inquiry Name:  

![Add]

12. Type in a name for the inquiry, underscoring between words, as shown in the screenshot below. Click the Add button. For future inquiries, you will click on the Find an Existing Value tab to select the inquiry name and run the inquiry in the future. You will not need to create it again for future inquiries.

**Budgets Overview**

![Find an Existing Value | Add a New Value]

Inquiry Name: Bud_Over  

![Add]

13. The screen for the Budget Overview will appear. Users will need to enter the following:
   a. Description: Enter Budget Overview  
   b. In the Ledger Group select the appropriate Ledger Group Description.  
      i. APPROP for non-personal services  
      ii. ORG for personal services  
      iii. 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**

14. Click the **Search** button.
15. 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.

![Budget Overview Results](image1)

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

![Budget Overview Results](image2)

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